Alexandria®

Version 6

Getting Started Guide

For Macintosh and Windows

Alexandria v6.22

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Alexandria Hosted Getting Started Guide
Printed October 3, 2012—v6.22
Printed in the United States of America by

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Welcome to Alexandria!

A Note About the *Getting Started Guide:*
Much effort was dedicated to produce a guide for a program that will unequivocally change after release. At the time this guide was completed, all of the information contained within was as accurate as possible. However, software such as Alexandria continuously evolves through patches and updates designed to improve the experience for all users. This means that some of the data contained in this guide may be outdated at some point in the future, *especially* where it concerns online modules and the features and functionality relating to it. However, when changes *do* inevitably happen, we provide additional dynamic assistance through our technical support and online help channels; *www.companioncorp.com/mediawiki/index.php*.

Welcome to the family!

Congratulations on selecting **Alexandria** as the information management system for your library. Alexandria is a powerful application that helps you to manage your assets and allows your patrons to fully access your library's resources.

The *Alexandria Getting Started Guide* is divided into sections that correspond to the major areas of the program, providing you with sequential, step-by-step instructions for setting up Alexandria's preferences and beyond. Our goal is to take you from your initial installation to the eventual circulation of items, assisting you in taking your very first steps with us.

By reading this guide in its entirety *(no skimping!)*, you will gain the insight required to run Alexandria, and thus, your library, more efficiently. You can also find an electronic version of this guide on the installation CD-ROM or as a downloadable `.pdf` from our website:

`www.goalexandria.com`.

So, let's begin!

The Alexandria library automation system consists of a main information server called the **Data Station**, the central repository for all your library system information. The Data Station is home to the **Data** folder, where all your crucial patron, item, and library system information (data) is saved; it also processes all the activities and command requests from networked client **Workstations**.

The Data Station can perform the same basic circulation functions (and beyond) that the **Librarian** and **Researcher Workstations** (i.e. clients) are capable of performing.

Alexandria offers a variety of expanded modules and client programs that can access the information on your Data Station(s)—your license determines which clients and modules you can use. Modules and clients are available for both the Macintosh and Windows operating systems, and can easily access and communicate with your Data Station(s) to perform specific library functions.

Alexandria Configurations

- **Central Union** houses many library collections in a singular **Data** folder stored on a central Data Station. This gives management control to a sole administrator; all updates, upgrades, data backups, and other management procedures are performed for the *entire district* at a centralized location. Even though all your data is centralized on a main server, patrons have the ability to search an individual library, a group of libraries, or the entire district at once—*in real-time!* Since there is only one central patron database, Central Union allows the most convenient access to inter-library loans (**ILL**). Those considering Central Union should plan to address overlapping barcode ranges, policies, preferences and cataloging. When considering add-on features, all libraries must subscribe to the same services. For more information on "Central Union" and what is affected by it, please consult Alexandria's On-Line Help.

- **Distributed Union (WAN)** gives librarians in a group of sites the ability to share resources with each other, yet still manage and control their own collections independently. **Data** folders are housed on separate Data Stations in each library, or at a "server farm" in a central location. Patrons have the ability to either search an individual library, a group of libraries, or the entire district at once. Alexandria's advanced search features allow libraries to simultaneously access all collections in real-time. Each library can choose an appropriate license level for their patron base and anticipated usage. Each library maintains control over policies, preferences and cataloging.

- **Controller (MDS)** functions with each library having their own separate database, however, all databases are housed on one central server and managed by the Alexandria Controller. The Controller gives administrators in a group of sites the ability to share resources with each other (i.e. other Alexandria libraries), yet still direct and control their own collections independently. Alexandria Controller can update and archive all of the databases at once to a single location. Not only does this configuration make life easier for your information technology (IT) staff, it gives librarians the autonomy to manage their own records and policies. Patrons have the ability to either search an individual library, a group of libraries, or all libraries at once. Alexandria's advanced search capabilities allow libraries to simultaneously access *all* collections in real-time. Each library can choose an appropriate license level for their patron base and anticipated usage. Each library maintains control over policies, preferences and cataloging.

- **Hosted** databases are housed directly at one of our private, first-class, data network facilities on secure, access-restricted machines that are protected by battery backup, housed in a climate-controlled environment, and connected to the internet via a 100MB (minimum) fiber-optic connection. Hosted servers that store library data are maintained on hardware that is configured with hard disk drives in a RAID array; in the event of hard drive failure, service will not be interrupted. All data is backed up daily and stored on COMPanion servers, with an additional daily backup stored securely off-site at a separate data network facility. All services are monitored electronically by certified professionals 24/7, so if a problem does occur, it can be addressed quickly. Equipment modification and upgrades are completed swiftly and scheduled during off-hours and low-use periods.

Alexandria Modules

- **SIF** ensures that K-12 instructional and administrative software applications work together more effectively. SIF is an industry-supported blueprint that enables diverse applications to interact and share data seamlessly. SIF reduces the redundancy of data entry and allows data to be efficiently exchanged among different applications using a standard set of specifications.
- **SIP2** allows you to utilize SIP2 hardware (e.g. Checkpoint, 3M, etc.) by supporting the SIP2 protocol. Make your library more efficient with enhanced inventory and security features. Empower your patrons with self-service check-in and -out modes, allowing you more time to focus on patron information needs.
- **Advanced Bookings** provide a valuable extension to the reservation capabilities that come standard with Alexandria. This useful module streamlines the management of centralized media centers that process numerous requests each day.
- **Alexandria WAN** (wide area network) allows you to access library collections on other Data Stations connected to your network.
- **Z39.50 Services** is a built-in server/client, making it easy to share your own resources with others in your district (or community) and allowing patrons to access your data from community locations running Z39.50 clients.
- **Lexile** is a scientifically-based reading measurement that can be used to match a patron's reading ability to the overall difficulty of a specified text. This module provides educators with a standardized system of measurement, allowing them to better monitor the reading progress of their students. Lexiles have become the most widely-accepted reading measurement in use today; renown as the most accurate way of matching readers to suitable text.

Expanded Services

- **Alexandria Web Router** is an efficient and secure solution to manage the web access and interface of multiple library collections. Web Router enables administrators to limit access to a single machine or IP address as the web access point for multiple Data Stations.
- **Alexandria Patron Server** allows the entire patron record database to be stored in one central location and every Alexandria and/or Textbook Tracker Data Station, once configured, can import new (or update existing) patrons as needed.
- **Alexandria Controller** allows you to house multiple, associated Data Stations on a single, centralized server. This facilitates easy access to the server and saves travel time as well as the maintenance time required when individual library systems are stored on multiple servers. Before hosting your own Controller environment, consider having COMPanion host your data at one of our private, first-class, data network facilities. If you would like to know more about our Hosted Services, please contact your sales representative at (800) 347-6439 for information and pricing

Search Extras

- **Soundzabound** is the only subscription service that specializes in royalty-free music and audio-clips which meets all of the licensing and technology requirements necessary for education! The Soundzabound audio library offers a wide variety of music, audio themes and sound effects for grades K-12 and universities—all royalty-free to ensure your copyright safety. Perfect for podcasts, PowerPoint™, videos, news shows, video yearbooks, digital storytelling, presentations, TV broadcasts, web design and more!
- **NetLink** (DartClix, DartClix 4 Kids) is COMPanion's collection of catalogued websites in MARC/MARC 21 format. DartClix helps patrons find clearly-organized and recognizable library information by increasing your collection with thousands of professionally catalogued websites.
- **netTrekker Search**, unlike ordinary search engines, contains *only* academic-focused websites that are organized around K-12 curricula. A team of 400 educators and librarians evaluate websites for academic integrity and age appropriateness before they are considered for inclusion in netTrekker. Using netTrekker, students can safely search the internet for school projects and get high-quality, contextual results every time. netTrekker Search provides a complete K-12 academic search tool for your entire district with content customized for Elementary (K-5) or Secondary (6-12).
- **Sneak Peek** users will enjoy title reviews, summaries, and cover art straight from Alexandria's search interfaces. Hyperlinks connect patrons to this resource, displayed within your chosen web browser. Alexandria Sneak Peek offers a wealth of descriptive information and cover images relating to all types of books, from juvenile chapter books to conference proceedings. Various elements of content are added to update this information on a weekly basis. With Sneak Peek, you'll have access to more than 1.5 million ISBNs all with associated data elements.
- **SearchALL** accesses all sorts of informational sources which may be searched simultaneously with a single user query and are displayed in one, organized **Results** window. With Alexandria SearchALL, there's no need to submit and resubmit searches and sources. The sources SearchALL can access simultaneously include, but are not limited to, other library collections, search engines (such as Google and Yahoo), databases like Ebsco and ProQuest, the Library of Congress, online encyclopedias and much more!
- **Alexandria Explore** provides a powerful graphical interface to your Alexandria collection. The interface uses pictures and icons to help patrons who do not yet read proficiently find what they need in your collection.
- **Z39.50 Services**, including **MARC Search**, allows patrons to search numerous collections simultaneously, enhancing research, reference, and much more. You can access public libraries, academic libraries, and other collections using an extremely friendly, built-in interface. You can also search **Mitinet's AccessMARC** server if you are a licensed user.

Alexandria Clients

- **Alexandria Librarian Workstation** is used by the operator to perform library functions such as circulation, cataloguing and all other administrative functions; since Librarian Workstations are synched with the Data Station, many libraries will choose to use the Data Station to perform these functions. Keep in mind that you may use as many Librarian Workstation clients as your license permits—but you will always only have *one* Data Station.
- **Alexandria Web Librarian** when licensed, is used to perform all the same functions as a Librarian Workstation, only using a standard *world wide web* browser such as Mozilla's Firefox, Apple's Safari, Google's Chrome, or Microsoft's Internet Explorer.
- **Alexandria Researcher Workstation** is used by patrons to access and search your library collection(s) and place holds and reservations on the items that they discover in your catalog. All this is done on-line using a standard *world wide web* browser such as Firefox, Safari, Chrome, or Internet Explorer. The Researcher Workstation can also be accessed on iPads and other portable devices.
- **Alexandria District Librarian** has all the functionality of a single-user Alexandria license plus the ability to access and modify *any* **Site** in the **District Address Book**, which, once licensed, will appear in the **System Preference Address Books** window. This option is most beneficial to District Administrator operators who govern multiple libraries.

The Unparalleled Power of Alexandria!

Alexandria contains several advanced technologies. Although it's not necessary to understand how Alexandria does what it does, this section is for the technical person who wants to know more about the inner workings of Alexandria.

Alexandria is built on top of a proprietary cross-platform (Windows and Macintosh) development system designed specifically for Alexandria. The core components of this system consist of the following unique technologies:

- Although we allow the operating system to act as the multi-threaded scheduling system that manages all the executable components of the program these days; messages for our threads are still prioritized and queued automatically by our software.
- A powerful communications system that supports TCP/IP communications protocols and addressing. This system can handle thousands of simultaneous messages. All messages are compressed for communications confidentiality. Only authorized messages are processed by the system.
- An integrated web server provides many researcher options via standard web browsers across all platforms that support web protocols.
- A powerful database engine optimized for storing and accessing library information. Saved data is obfuscated for added data security. The database is *very* high performance—on an older processor with a standard disk drive, it can fully catalog up to 15-35 MARC records per second.
- A class library for developing cross-platform human interfaces.
- A proprietary toolbox of code used by all subsystems.
- A fully-distributed transaction-based client/server architecture. The server (Data Station) processes requests from all clients. Only information necessary for processing is moved between clients and the Data Station. This places very low demands on overloaded networks.

Communication Ports & Protocols

There are a number of ports that are required to be open in order to successfully use Alexandria:

Client machines (e.g. Librarian or Researcher Workstations) contact the Alexandria Data Station (sometimes referred to as the server) through **Port 30427**.

Your Alexandria Data Station can update through our update server; for this we use passive FTP. You should connect to **Port 80** or **Port 30427** in order to communicate with *updateserver.companioncorp.com* (*209.210.70.29*); you also need to allow **Port 21**.

Z39.50 queries (i.e. MARC record queries) use **Port 210**, **Port 2200** and **Port 7090**. Whatever computer is being used to catalog books using a Z39.50 server needs these ports open. The Z39.50 search originates from the machine doing the search; when a record is saved, it is sent to the Data Station over **Port 30427**. The vast majority of servers use **Port 210**, some use **Port 2200**, and the Library of Congress uses **Port 7090**.

Alexandria Workstations communicate with the hosted Alexandria Data Station using TCP/IP protocols. With Bonjour (formerly Rendezvous), clients are able to rediscover and reconnect to the Data Station on a local area network should the IP address be changed or lost. Alexandria *does not* support Macintosh's **AppleTalk** protocol.

If you use clients, the Alexandria Data Station should, ideally, have a fixed TCP/IP address. Although the address for the Alexandria Data Station can be dynamically allocated, COMPanion recommends it be static.

- **TCP/IP** (**T**ransmission **C**ontrol **P**rotocol/**I**nternet **P**rotocol) is the protocol used for the internet and is supported as part of the basic operating systems for both Macintosh and Windows.

Where is My Alexandria Data Folder Located?

Your Alexandria **Data** folder is stored in your operating system's shared application support directory.

On Macintosh OSX machines, this folder is located in the following directory:

Hard Drive > **Users** > **Shared** > **Library** > **Application Support** > **Alexandria Support**

On a Windows XP, 2K, or 2K3 machine, the shared application folder should be found here:

Hard Drive *(typically C:)* > **Documents and Settings** > **All Users** > **Application Data** > **Alexandria Support**

On a Windows 7 or Vista machine, the shared application folder should be found here:

Hard Drive *(typically C:)* > **ProgramData** > **Alexandria Support**

Notes and Warning Alerts

- NOTE -

Look for a box like this for special notes or comments that should be carefully examined by the user!

- WARNING -

Look for a box like this for warning messages or important comments that should *not* be ignored!

- HOST-IT-NOTE -

Look for a box like this for special notes or comments that only concern hosted users or those who may be considering moving to our hosted service.

Preparing for Alexandria

This chapter provides an overview on how to prepare for the automation of your library collection.

To better comprehend how Alexandria works, we recommend that you have the software up and running as you follow the steps provided in this *Getting Started Guide*.

Automating Your Library Overview

Use the following steps (and referenced pages) to prepare your library for automation with Alexandria:

Step 1. Develop strategies for both secure backup and item/patron importation; *see page 10*.

Step 2. Barcode your collection; *see page 14*.

Step 3. Install Alexandria; *see page 19*.

Step 4. Set **Scheduled Events** (**Archive** & **Rebuild**); *see page 63*.

Step 5. Amend your **Union** (i.e. main) site information or add additional sites (if licensed for **Central Union**) using the **Sites Management** window; *see page 51*.

Step 6. Create your system operators and assign them a **Site** and a **Security Group**; *see page 261*.

Step 7. Set what COMPanion considers to be your essential **System Preferences**; *documented here on pages 59 through 151*.

Step 8. Add your item and patron information; *see page 155*.

Step 9. Develop an Alexandria/machine maintenance strategy; *see page 18*.

Step 10. Evaluate the security of your Data Station; *see page 18*.

NOTE:
Alexandria's **Archive Utilities** *do not* substitute for a proper backup!

Develop a Secure Backup Strategy

Backups are duplicated computer files that should be saved to an external source. You should have a backup strategy in place to ensure that you always have a current backup of your Alexandria data files.

- WARNING -
Daily backups of your Alexandria data are highly recommended!

- HOST-IT-NOTE -
Backing up your data isn't necessary for Hosted customers and is, therefore, not an option.

Backing Up Your Data; What to Backup

Your data files change every time you use our software. For example, each time you update an item or patron record, circulate an item, or perform any other transaction or utility, the data files are modified to reflect your changes.

All Alexandria information is stored in the **Data** folder *(see page 8 to find out where your **Data** folder is located);* this makes it easy to backup your data on a regular basis.

When backing up files, please note that there are two different kinds:

- **Program Files** are the files that make your applications run. These files are sent to you on CD or are downloaded from the internet and you install them. In the case of hardware failure, you can reinstall these program files. For this reason, you are allowed to make *one* backup copy of the original CDs to archive before storing both the original and backup copy in a safe place.
- **Data Files** are where your patron, item, report, and system preference information is stored. When you input and change information using Alexandria, your data files are updated. Because these files likely change every time you use the application, and because losing all the data you have manually entered can be a *major* loss, you *must* make backup copies of your data on a regular basis.

Why You Must Backup Your Data

If you think disaster can't happen to you, think again! Although modern-day computers are generally reliable, they are still as fallible as those who created them. Inevitably, at some point during the life of your computer, you will suffer a hardware malfunction that will cause data loss within Alexandria.

Sadly, more often than not, human error is to blame for data loss; an operator makes large, incorrect changes to your data, or, in a moment of distraction, data is accidentally deleted. Although you can always replace broken computer components and reinstall the Alexandria application, doing so will *not* retrieve lost data files.

Your only options for recovering lost data when you have suffered from hardware malfunction or human error are to either re-enter your data by hand or to recover it from your most recent backup copy—and then update only the data that had changed since the last backup was made. The more current the backup of your data, the less data you will have to re-enter.

Far too frequently we get contacted by customers hoping we've somehow stored a copy of their pre-crash data so that they won't have to start from scratch. Some of these customers had backups, but they turned out to be damaged, or, when attempting to recover their backup, they accidentally erased it!

Because of these occurrences, it's very important for your Information Technology Service departments to ensure that they have a backup strategy in place so your library data is secure and that you always have a current backup of your most recent Alexandria data files. With adequate backup procedures in place, only small amounts of information will ever be lost, even after the worst conceivable failure.

Your backup procedure for Alexandria should copy the entirety of the **Data** folder. Some automation systems only backup your transactions on a daily basis. Although this technique results in a fast backup, it's not complete, and recovery can take much longer than a full backup.

If you make a backup copy of the **Data** folder at the end of each day, you'll be able to recover all the changes you've made through the end of that day; you can then recover the data quickly and easily, should it be required.

Although Alexandria has a built-in **Archive** function that saves a copy of your data in an **Archive** folder, this is *not* useful if the hard disk where your data is stored is damaged. Therefore, we suggest frequent data backups, and storing these copies of your data at a safe location outside of your library.

Over the past few years, new and inexpensive "cloud storage" services have made off-site backup easier and, in many cases, cheaper. One such service is called **Dropbox** (`www.dropbox.com`) where an initial 2GB account for backup is free, with other paid options available at very reasonable prices.

Whatever you put into your **Dropbox** folder is automatically saved onto their remote servers and can be recovered quickly in case of disaster. **Dropbox** isn't just used for backup, however, it's also a great tool for collaboration as saved files can be synced with other machines—even between Macintosh and Windows. Better yet, **Dropbox** keeps copies of your data for up to a month. If you have modest needs, **Dropbox** is simple and free.

Another service is **CrashPlan** (`www.crashplan.com`), a great general purpose tool specifically designed for backup to other machines, or off-site to the **CrashPlan** servers. In fact, COMPanion uses **CrashPlan** to backup all of the machines at our corporate offices. For more advanced backups, **CrashPlan** can help you protect your valuable library data.

There are many other cloud storage services available, each with their own unique benefits. However, the service you use isn't as important as performing frequent and secure backups of your valuable data. If you don't already have a backup strategy in place, start one today!

NOTE:
Daily backups of your Alexandria data are *highly* recommended!

Determining a Backup Strategy

A backup strategy is a schedule for performing backups at regular intervals. It is *highly recommended* that you use the following guidelines in your backup strategy.

- Before using a new service, perform an initial backup to create a permanent archive of your data.
- **Create a schedule to backup your Data folder at the end of each day.**
- Make additional backups before and after you make any major changes to your system. For example, after you perform an inventory and use **Utilities** to update your records at year-end, you should backup your data.
- To minimize data loss due to faulty backup devices (such as a portable hard drive) avoid using the same USB Flash, portable hard drive, or CD/DVD-RW for consecutive backups.
- Make more than one backup copy of data and keep copies off-location. This protects your data in case of fire or theft in the library. Some institutions will choose to take backup copies off-location each week; others daily, and others monthly. Some institutions will choose to do this via cloud storage. Remember, the more recent the backup, the less information that will need to be re-entered.
- Test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this *before* you have a problem so you'll know that you can recover data in an emergency.

Backup Services

Although you can use any computer mass storage device for backups, the most reliable and cost-effective choice is cloud storage[1] (e.g. **Dropbox**, **CrashPlan**, **Mozy**, etc.) and removable media (USB Flash, CD/DVD-R, CD/DVD-RW, etc.). COMPanion recommends that you **DO NOT** backup on any hard disks connected to your computer. For reliability's sake, backup media should be stored away from your computer in case of theft, fire or other physical loss.

If you have a large amount of data, cloud storage backup is the most reliable, cost-effective and efficient method. With cloud storage, you can set backup procedures to run at a predetermined day and time without operator interaction. Currently, most cloud storage services allow you to upload several gigabytes of data for free when you create an account. If you have smaller amounts of data, removable media devices, such as external hard drives, provide ease of use and security.

Your choice of backup hardware will depend on your budget, the amount of data you need to backup, and the policies and procedures within your district or library.

1.Cloud storage is a model of networked computer data storage where data is stored on multiple virtual servers, generally hosted by third parties, rather than being hosted on dedicated servers. Hosting companies operate large data centers; and people who require their data to be hosted buy or lease storage capacity from them and use it for their storage needs. The data center operators, in the background, virtualize the resources according to the requirements of the customer and expose them as virtual servers, which the customers can themselves manage. Physically, the resource may span across multiple servers.

Sample Backup Strategy

An increasing number of online cloud storage services offer low-cost backups. This strategy requires installing a piece of software (i.e. a "client") on your computer and then backing up your data to their internet servers, generally referred to as the "cloud". Leading contenders include **Dropbox**, **CrashPlan**, **Carbonite**, and **Mozy**.

The following is a sample strategy for using routine cloud storage backup during normal operations:

Step 1. First, choose a cloud storage service. There are many factors to consider, including the service level agreement, speed, cost, etc.

Step 2. Next, install the cloud storage client software of your choice.

Step 3. During setup, select the files and/or folders you want to back up immediately; for example, the *entirety* of Alexandria's **Data** folder.

Step 4. Be sure to set up automatic backups to run at times of the day when your network isn't being flooded with other traffic (e.g. `4:00am`). This guarantees faster upload and reduces the possibility of failure due to network traffic.

Step 5. Some services allow you to add specific days (e.g. next `Friday`) or perform manual backups of files and folders; this usually works in tandem with the automatic backup schedule you configured in the step above and comes in handy before performing an inventory or using **Utilities** to update your records at year-end—things that generally make large, sweeping changes to your library data.

Step 6. Most cloud storage services will usually flag files that have already been backed up. Therefore, if files have not changed in any way, they will not be backed up again after the initial backup is complete. This speeds up the process remarkably as only new files are backed up each time and duplicate files are not.

Step 7. As with any backup strategy, you must also think about how to restore lost data. Most cloud services allow you to select an individual file for immediate download, download an archived bundle of all your files, or have your files sent via removable media (e.g. CD/DVD-ROM). Whatever you choose, be sure to test recovery procedures before you have a problem so you'll know how to recover your data in case of an emergency.

Saving to the cloud helps to store your files in a location other than the library, which guards against loss of data in case of fire or theft.

Barcode Your Collection

Each item and patron in your library is assigned a unique number that Alexandria uses for identification. These numbers appear as barcode numbers on library items and patron library cards.

A typical barcode label consists of three pieces of information:

- The name of the library, school, or company.
- The barcode, usually printed in the middle of the label.
- The barcode number written in numerals at the bottom of the label.

A barcode can be read quickly by powerful, low-cost scanning devices that you can purchase from COMPanion. Using a barcode reader makes your job easier and reduces the chance for errors. If you don't have a scanner, you can type the user-readable number in the command line.

The format of the barcode is called its *symbology*. The symbology COMPanion uses, Code 39 (also known as Code 3 of 9), is the industry standard for industrial and commercial applications—including libraries. This symbology provides a high level of data security with error rates between 1 in 3 million and 1 in 70 million characters scanned. Code 39 does not require a check character in normal commercial and industrial applications. It is also bi-directional, which means it can be scanned from left to right or from right to left.

You will need barcode labels on all of the items in your library that are to be managed with Alexandria. You may also want to barcode objects such as audio-visual equipment, computers, desks, and tables, so you can use Alexandria to inventory these items.

You can also keep temporary item records such as magazines and newspapers. Temporary items can be assigned a barcode number and then circulated like permanent items. A barcode number is assigned to a temporary item only while it's checked out.

Guidelines for Choosing Barcode Numbers

You can set up barcode numbers (according to your needs) using up to fifteen digits. The following are general guidelines for determining your barcode numbering:

- Use the same number of digits for items and patrons.
- Consider using an employee ID or student number for patron barcodes (be sure employee IDs or student numbers do not coincide with item numbers).
- If you have more than one library in your system, use a unique barcode numbering scheme for each library's collection. This will make it easier to manage a central catalog with holdings from all libraries within the system. If items are moved between collections, the barcodes will remain unique and do not interfere with existing item barcodes.
- Use the simplest numbering scheme possible that still meets your needs.

Sample Barcode Numbering Scheme

The following is a sample library barcode numbering scheme. This scheme supports management of up to 899 libraries with each library having up to 300,000 patrons and 700,000 items. You can vary this scheme to handle more libraries, groups within a library, or independent items.

> **- NOTE -**
>
> It is recommended that you avoid starting barcodes with zero ("0") as the first digit. Barcodes can contain letters and numbers; spaces and punctuation are *not* allowed.

This sample scheme uses a 9-digit barcode number for items and patrons.

- **Digits 1 to 3** identify the library. For example, 100 is Eastside Library, 200 is Westside Library, and so forth.

  You can use the three digits within this group to further breakdown the libraries. For example:

  110 — Eastside Elementary School's library
  130 — Eastside Middle School's library
  150 — Eastside High School's library
  210 — Westside Elementary School's library
  230 — Westside Middle School's library
  ...and so on

  If you have more than one library in your system, using unique barcodes for each library's collection makes it easier to manage a central catalog with holdings from all libraries in the district. All barcodes are unique and do not interfere with barcodes for existing items.

- **Digit 4** can tie a barcode to a patron group such as students or staff, to a medium type or vendor, or to an item group such as fiction or reference. For example, if you use 0 through 2 for patrons and 3 through 9 for items, you will have unique barcode numbers for 3 patron groups and 7 item groups.

- **Digits 5 through 9** identify the individual patrons or items in the group.

Using the above scheme, you would have barcodes similar to the following. The bold digits identify the library, the underlined digit identifies the patron or item group, and the remaining digits identify the particular patron or item.

110 2 00361 **110** identifies the library

2 identifies the patron or item group

00361 is the specific patron or item's number

If you have a smaller number of patrons, you can choose a simpler code with fewer digits. The main objective is to keep the number of digits the same for items and patrons to ensure that each library in a district has a unique range of barcode numbers and to use the most straightforward numbering scheme as possible, while still meeting your needs.

NOTE:
The spaces between numbers in the barcode example to the left are for readability.

The actual barcode would be entered as:
110200361

Classes of Barcode Labels

There are two classes of barcode label.

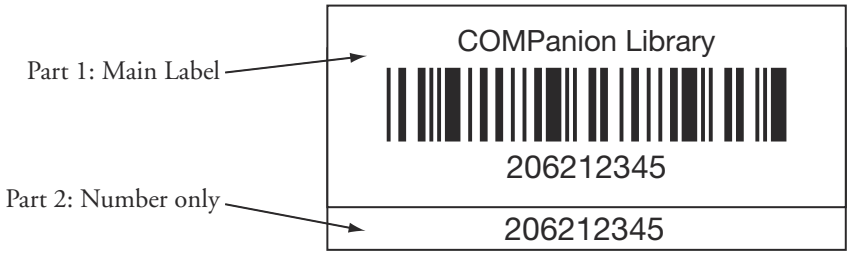
- **Photocomposed labels** are made using a photographic process to create high-quality, long-lasting labels. Rather than printing ink on paper, the photocomposed process makes the barcode image an integral part of the label. These labels usually come with high-quality lamination and adhesives that make them durable and easy to attach. You should use photocomposed labels on all permanent items.
- **Printed labels** are made using a printing process that places the ink on top of the label. These labels require protection of some kind to keep the ink from rubbing off; a layer of transparent Mylar can be placed on these to extend their lives. Although the cost of these labels is less than photocomposed labels, the protection and labor they require can cause them, in some cases, to cost more. Printed labels without extra protection are most cost-effective when printed by you in your library and used for temporary items such as magazines and newspapers.

One and Two-Part Labels

You can purchase either one or two-part barcode labels, depending on how you plan to use them. One-part labels include the library name, barcode, and written barcode number.

If you want to place a barcode label in two different locations on an item, you can order two copies of these one-part labels.

Two-part labels include the same information as the one-part label. The two-part labels also include a second portion on the label, which display the written barcode number.



The second part of the label is useful to attach to a shelf list card or to place on the book in a different location than the upper portion.

Two-part labels provide the benefit of having two labels for each item, at a lower overall cost.

Where to Place Barcode Labels

You can place barcode labels on the inside or outside of items. A label on the outside is easy to locate, but is subject to much greater wear and tear, therefore shortening its lifespan.

Most Alexandria users place their labels on the inside back cover of books and on the outside of items such as records, tapes and CDs.

If you plan to place barcode labels under a transparent jacket cover, test your barcode reader to make sure it can read the labels through the jacket cover.

Placing barcodes vertically on the back cover next to the spine can make inventory easier since you wouldn't need to fully remove the books from the shelf to scan them with a barcode reader.

When to Label Items

You can label items either before or after you enter your item information.

For an existing library collection, it's usually easier to purchase your barcode labels early and place them on items before the item information is entered into the computer. Use two-part labels for this method. As you place the barcode on the item, place the second label on the shelf list card that will be used for entering item data into the computer.

If you are starting a new library, be sure to purchase bibliographic information for your items in a computer-readable format (MARC or MicroLIF). Either order your books with barcode labels attached, or tell your supplier which numbers to assign (in the MARC/MicroLIF records). Have the numbers assigned in call number order so it's easy for you to locate the item for each barcode label you have to apply.

Barcode Readers

Your computer requires a special device designed to read a barcode number and enter the corresponding value into the computer. This device is called a *barcode reader* or *scanner*.

There are a number of different types of barcode readers available, including light-pen readers, laser readers and portable readers. The device you choose depends on your budget and the library's requirements.

Wand or pen-type readers are the least expensive devices for reading barcodes. CCD wedge or laser scanners are more expensive but do a better job reading the labels (especially in those hard-to-reach item places).

Portable readers give you the freedom of going to your bookshelves to scan labels, rather than having to take the books to the computer to be scanned. Portable readers are especially useful during inventory.

Develop Maintenance Strategies

a) Develop a Machine Maintenance Strategy

Although computers today are very useful tools, they can experience damage through excessive use, power fluctuations, crashes, and incorrect operations. To discover or postpone such damage, you should run maintenance utilities such as **Scandisk** or **Disk Defragment** on Windows and **Norton Disk Doctor** on Macintosh. Alexandria *should not* be running during *any* machine maintenance operations.

In addition, you should regularly perform a virus scan with products such as **Norton Anti-Virus ESET Nod32**, **Malwarebyes**, **Microsoft Security Essentials**, or **McAfee Virus-Scan**. Again, Alexandria should *not* be running when performing such virus scans.

b) Develop an Alexandria Maintenance Strategy

Corruption can happen to any database of information via hardware or operating system error. It is recommended that you use Alexandria's **Rebuild Utilities** on a regular basis—once a month is usually sufficient for a single Data Station, twice a month for multiple Data Stations housed within the Alexandria Controller, and once a week for Central Union users.

However, hardware or system failure may necessitate using this utility more often. The **Rebuild** disables all services while it is cleaning your data and can take several hours depending on the size of your data and speed of your machine. You should backup or archive prior to running a **Rebuild**, just as you should with any other utility.

Evaluate the Security of Your Data Station

Some libraries may not have the funds or hardware necessary to have both a dedicated Data Station and accessible clients. If your Data Station is accessible to the general public, you may want to enable additional security that would prevent unauthorized users from deleting, renaming, or moving your Alexandria application or **Data** folder. Some file security may be built into your operating system; some operating systems have no such security and would require purchasing third party software to provide that file security.

If you don't have file security on your Data Station, you should be extra vigilant in backing up your **Data** folder.

Installing Alexandria

This section will teach you how to install your Alexandria Data Station and Librarian Workstation clients. This guide assumes that you have a basic working knowledge of your computer's operating system. Before you install Alexandria, make sure that you have the registration letter that came with your software—it contains information that is essential during the installation process.

Hardware and Software Recommendations for Alexandria

Recommended hardware and operating system requirements:

	Recommended	Minimum
Alexandria®: Data Station	Mac OS 10.6+ Windows 7 or 2008 X86 Multi-Core/Processor 4 GB or RAM (or higher)	Mac OS 10.5+ Windows XP+ G4, Pentium 4 (or equivalent) 2 GB of RAM 20 GB of Free HD/100,000 Items 1024 x 768 Screen Resolution TCP/IP Network
Alexandria®: Central Union, Controller or District Librarian Data Stations	Mac OS 10.6+ Windows 7 or 2008 X86 or X64 Multi-Core/Processor Variable (see RAM recommendations)	Mac OS 10.5, Windows XP+ G5, X86, or X64 Dual Processor/Core Variable (see RAM recommendations) 20 GB of Free HD/100,000 Items 1024 x 768 Screen Resolution TCP/IP Network
Alexandria®: Librarian Workstation	Mac OS 10.6+ Windows 7 or 2008 2 GB of RAM (or higher)	Mac OS 10.5+ Windows XP+ G4, Pentium 4+ (or equivalent) 1 GB of RAM 200 MB of Free HD 1024 x 768 Screen Resolution TCP/IP Network
Alexandria®: Researcher	Microsoft Internet Explorer 9+ Mozilla FireFox (most current) Apple Safari 5+ (Mac OS X) Google Chrome (most current)	Microsoft Internet Explorer 8+ Mozilla FireFox 6+ Apple Safari 5+ (Mac OS X) 1024 x 768 Resolution

Controller/Central Union RAM Recommendations:

Up to **5** collections:
4 GB or more

Up to **20** collections:
8 GB or more

Up to **30** collections:
12 GB or more

Up to **50** collections:
16 GB or more

Technology Services Cheat Sheet

In order to use all of our software's services and built-in functionality, you should configure your firewall to allow access to the following ports and addresses. However, depending on the required internet security at your site, you may only want to enable firewall access for the services that you use.

Shown below is a list of addresses you should allow in your firewall's access control list.

Name	Ports	IP Address	URL/Web Address
Alexandria Data Station/ Librarian Workstation	30427		
Textbook Tracker Data Station/ Client Workstation	30467		
Amazon S3	80		*s3.amazon.com*
COMPanion FTP Support	21	209.210.70.4	*ftp.companioncorp.com*
COMPanion Cover Art Services			*aws.amazon.com* *images.amazon.com*
Google Analytics	80		*google-analytics.com*
MARC Search	210 2200 7090		
COMPanion Online Help	80	209.210.70.4	*www.companioncorp.com/mediawiki/*
COMPanion Support Email	25		*mail.companioncorp.com*
COMPanion Update Server		209.210.70.29 68.89.29.89	
COMPanion Web Service	80		
Lexiles	30427 30467		
Mitinet's AccessMARC	210		*z3950.accessmarc-db.com*
netTrekker			*school.nettrekker.com*
NoveList	80		*imageserver.epnet.com*
Sneak Peek		208.111.148.6	*www.syndetics.com*
Baker and Taylor			*schoolselection.btol.com*
Bound to Stay Bound (BTSB)			*www.btsb.com*
Capstone Publishers			*www.capstoneinteractivelibrary.com*
EBSCO			*www.ebscomags.com*
Mackin			*www.mackin.com*
Perma-Bound			*www.perma-bound.com/Alexandria*
SAFARI Montage			*safarimontage.com*
Soundzabound			*soundzabound.com*

Installation Summary *(read this first)*

The main Alexandria software must be installed on the machine you've designated as your Data Station (server); this can be done by a single person at the district level. Once installed, the Data Station will facilitate the installation of Librarian Workstation (LWS) clients; this software must be installed on each library computer you want used for circulation.

The Data Station has the same capabilities and basic circulation functions as your Librarian and Researcher Workstations (i.e. clients) and more. Your Data Station *does not* count as a client.

- If you are limited to a handful of computers, you may want your main circulation machine to also be your Data Station. In this case, you wouldn't typically install another Librarian Workstation. Your main Data Station *can* be used by operators for circulation and reporting.
- In a middle-sized configuration, you may have a computer in the "back room" or "server closet" that is only used for infrequent operator maintenance. Install the Data Station on this machine and your Alexandria Librarian clients on other machines.
- If you are planning on having a large number of clients, you'll want to install your Data Station on a dedicated machine (i.e. a machine that will *only* run the Data Station and will not typically be used by an operator). In this configuration, you'll be running Librarian and Researcher Workstations on other machines.

If one doesn't previously exist, the installer will create a **COMPanion Corporation\Alexandria** folder and extract the application there. All of your library information (data) will be stored in an **Alexandria Support** folder located in the system shared application directory *(refer to page 8 for more information)*.

Detailed below are the *general* steps required to install Alexandria. Operating system-specific instructions can be found in the remaining pages of this chapter.

Step 1. On the machine you are going to use for your Data Station, insert your COMPanion CD-ROM; you will find software installers within the **Alexandria v6.x Installers** folder. Alternately, you can visit COMPanion's website (`www.goalexandria.com`) and download the latest Alexandria installers from there.

Step 2. Alexandria will install to an operating system-specific directory. Once installed, double-click on the **Alexandria** icon to launch the software.

Step 3. Enter the registration information that came with your software.

Step 4. If your don't have all the necessary resources (e.g. **Alexandria Explore** or Librarian Workstation client installers), Alexandria will attempt to download them from COMPanion's update server.

Step 5. To install a Librarian Workstation client over the internet, you'll need to open an web browser on the machine where you wish to install the client. In the address bar of the browser window, type in the IP address of your main Data Station followed by "`/install`". Follow the instructions that appear on the web page to install your client(s).

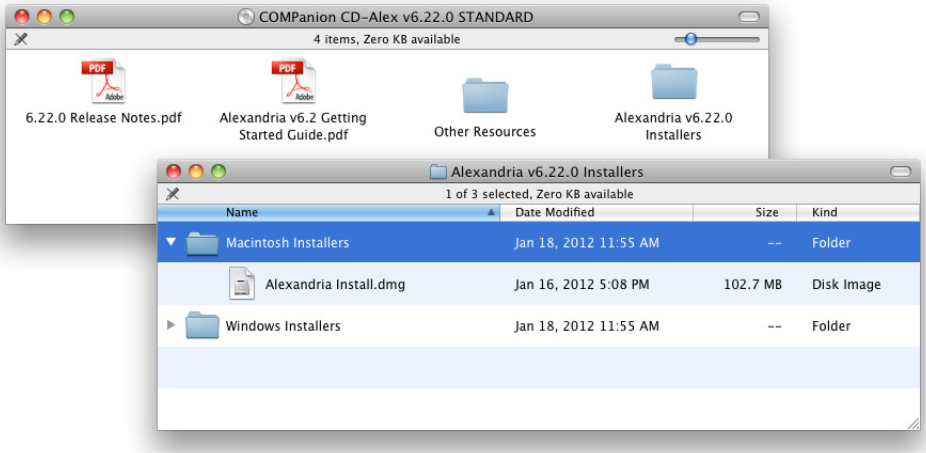
Step 6. If you've licensed use of **Lexiles**, **SIP2**, **SIF**, **Z39.50 Server**, or **Advanced Bookings** services, your registration code will activate them—all you need to do is set up your **Site Information** *(page 51)* and **Address Books** *(page 85)* system preferences.

Installing Alexandria on Macintosh OSX

Follow these instructions if you're installing **Alexandria** on a Macintosh OSX machine for the very first time. If you are installing a different configuration of Alexandria (e.g. Central Union, Controller, etc.), follow these steps substituting "Alexandria" with the corresponding product name where appropriate (e.g. **District Librarian Installer.dmg**).

If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: `support@companioncorp.com`.

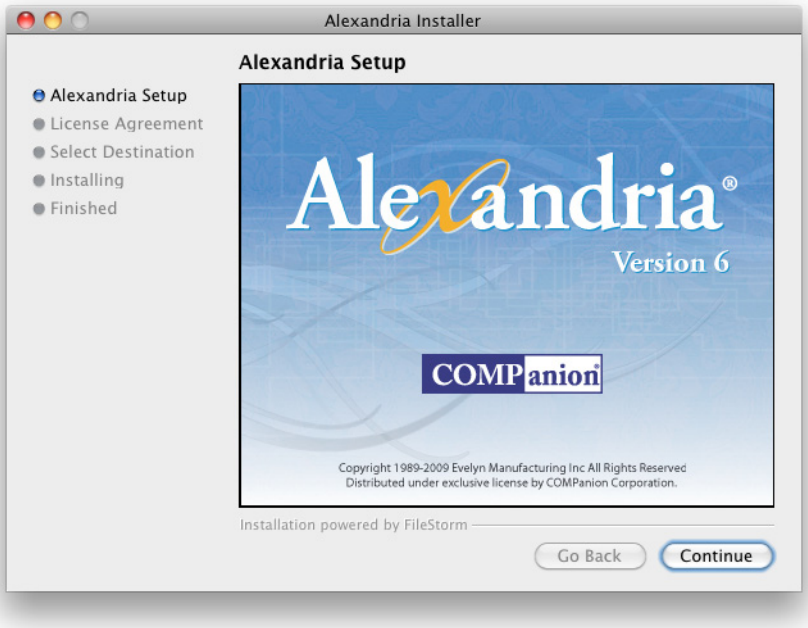
Step 1. Insert the **COMPanion CD**-ROM; you will find the Macintosh OSX software installers within the **Alexandria v6.x Installers** folder.



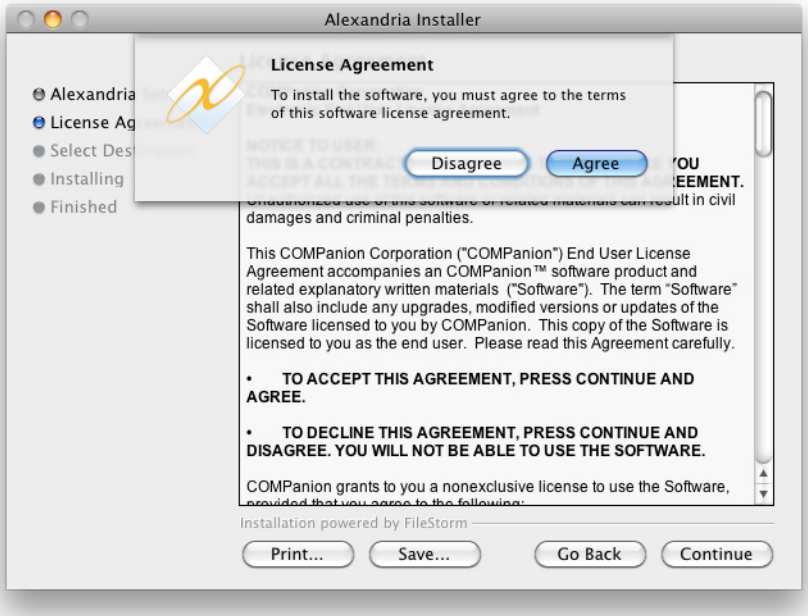
Step 2. The installers for your operating system will be located inside the **Macintosh Installers** subfolder. You can also visit COMPanion's website (`www.goalexandria.com`) and download the latest Alexandria installers there. Remember, the machine where you first install **Alexandria** will be used as your main Data Station.

Step 3. Double-click on the file called **Alexandria Installer.dmg**. Doing so will mount the **Alexandria Installer** icon on your desktop. When you double-click on the **Alexandria Installer** icon, the following window will appear.

Step 4. Double-click on the **Alexandria Installer** icon located inside this window. When the installer's **Alexandria Setup** window appears, click on **Continue**.



Step 5. Next, the COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and once you have finished, click **Continue**. A **License Agreement** drop-down menu will appear. Click on the **Agree** button if you accept the terms of the license. If you do not accept the terms of the license, click the **Disagree** button.


Alexandria Installer
License Agreement
To install the software, you must agree to the terms of this software license agreement.
Disagree
Agree
Alexandria
License Ag
Select Des
Installing
Finished
damages and criminal penalties.
This COMPanion Corporation ("COMPanion") End User License Agreement accompanies an COMPanion™ software product and related explanatory written materials ("Software"). The term "Software" shall also include any upgrades, modified versions or updates of the Software licensed to you by COMPanion. This copy of the Software is licensed to you as the end user. Please read this Agreement carefully.
• TO ACCEPT THIS AGREEMENT, PRESS CONTINUE AND AGREE.
• TO DECLINE THIS AGREEMENT, PRESS CONTINUE AND DISAGREE. YOU WILL NOT BE ABLE TO USE THE SOFTWARE.
COMPanion grants to you a nonexclusive license to use the Software,
Installation powered by FileStorm
Print...
Save...
Go Back
Continue

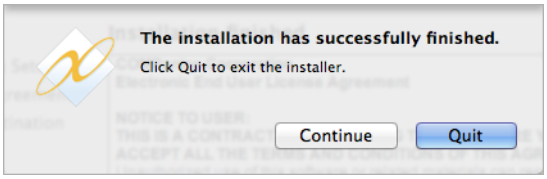
Step 6. When the following window appears, verify the destination disk where you'd like Alexandria installed. The default is the hard drive where the currently active **System Folder** is located. Unless special circumstances apply, this is usually the best location to install Alexandria. Select the icon of the hard drive so that a green arrow appears above it. Click **Install**.

Select a destination disk to install the software.
Macintosh HD
331.87GB (300.19GB Free)
Installing this software requires 176.1MB of disk space.
You have selected to install this software on the disk "Macintosh HD".
Cancel
Install

Step 7. During installation, the **License Agreement** window will reappear, updating you on the installation's progress.

Alexandria Installer
Installing...
Alexandria Setup
License Agreement
Select Destination
Installing
Finished
COMPanion Corporation
Electronic End User License Agreement
NOTICE TO USER:
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT.
Unauthorized use of this software or related materials can result in civil damages and criminal penalties.
This COMPanion Corporation ("COMPanion") End User License Agreement accompanies an COMPanion™ software product and related explanatory written materials ("Software"). The term "Software" shall also include any upgrades, modified versions or updates of the Software licensed to you by COMPanion. This copy of the Software is licensed to you as the end user. Please read this Agreement carefully.
• TO ACCEPT THIS AGREEMENT, PRESS CONTINUE AND AGREE.
• TO DECLINE THIS AGREEMENT, PRESS CONTINUE AND DISAGREE. YOU WILL NOT BE ABLE TO USE THE SOFTWARE.
COMPanion grants to you a nonexclusive license to use the Software,
Installation powered by FileStorm
Alexandria.app
Go Back
Install

Step 8. When the installation is complete, a confirmation window will appear. Click **Quit**.



Step 9. If you installed using a CD-ROM, eject the CD by dragging its icon to the **Trash Can** located on the desktop or the **Eject** icon in your OSX Dock. Store the CD-ROM in a safe place for future use

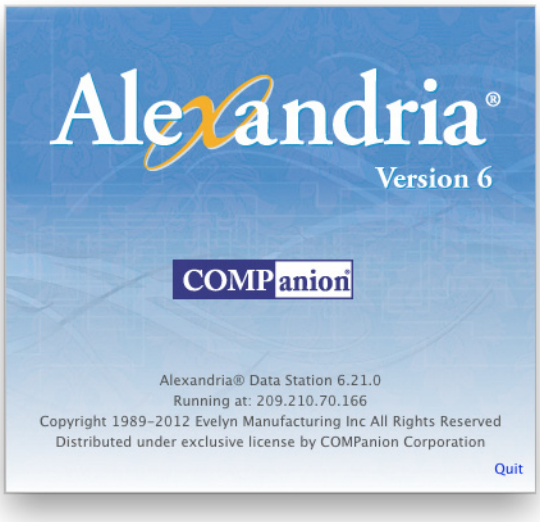
Step 10. Note: This *Getting Started Guide* is included on the Alexandria CD-ROM (in ".pdf" format) but is *not* installed with the application. You can double-click on the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there; you can even place it in the **Links** menu folder *(see page 44 for more information)*.

If you don't have **Adobe's Acrobat Reader** installed on your machine, download the most current version (for free) from Adobe's website: `http://www.adobe.com/`

Step 11. Locate the newly installed **Alexandria** folder on your hard drive; inside the folder, double-click on the **Alexandria** icon to launch the program.

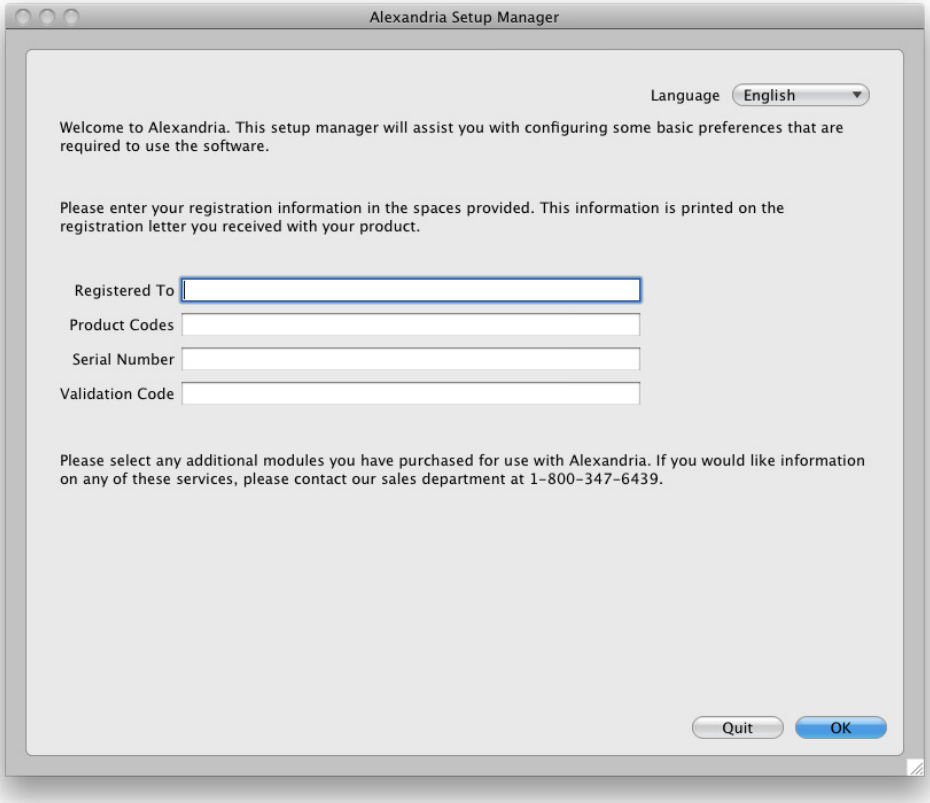
On Macintosh OSX machines, this is located in the following directory:
Hard Drive > **Applications** > **COMPanion Corporation** > **Alexandria**

Step 12. When you start Alexandria, the following window appears. If you have not yet registered Alexandria, the registration window will appear (described in Step 13).



Otherwise, the **Circulation** window *(page 211)* will appear.

Step 13. The first time you start the Data Station, enter your **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK** to continue.


Alexandria Setup Manager
Language English
Welcome to Alexandria. This setup manager will assist you with configuring some basic preferences that are required to use the software.
Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product.
Registered To
Product Codes
Serial Number
Validation Code
Please select any additional modules you have purchased for use with Alexandria. If you would like information on any of these services, please contact our sales department at 1-800-347-6439.
Quit
OK

Step 14. That's it! You've installed your Alexandria Data Station. If you've purchased a single-user license, you're finished installing. If you've licensed additional clients, see "Installing Alexandria Librarians" on page 33.

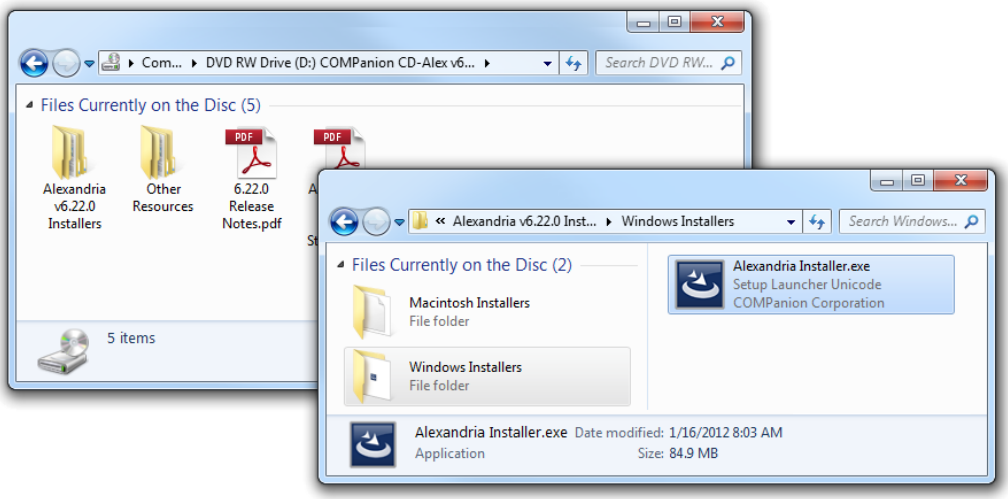
If you're part of a Central Union and need to set up additional sites, see page 51.

Installing Alexandria on Windows

Follow these instructions if you're installing **Alexandria** on a Windows machine for the very first time. If you are installing a different configuration of Alexandria (e.g. Central Union, Controller, etc.), follow these steps substituting "Alexandria" with the corresponding product name where appropriate (e.g. **District Librarian Installer.exe**).

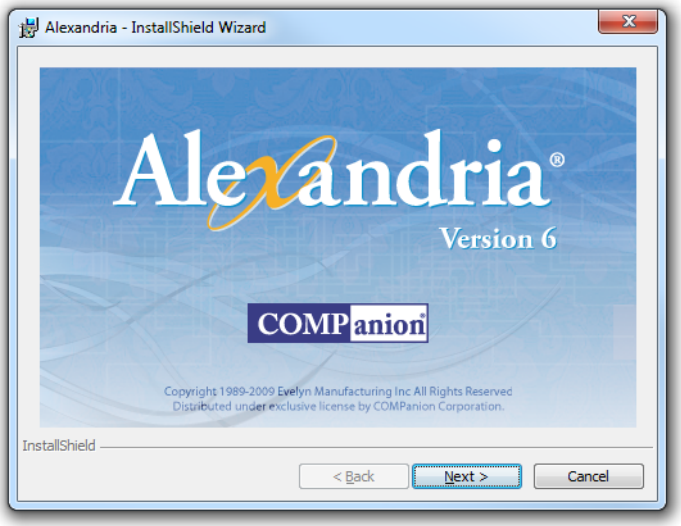
If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: `support@companioncorp.com`.

Step 1. On the machine you are going to use for your Data Station, insert the **COMPanion CD-ROM**; if it doesn't auto-start, you may locate it using the **My Computer** icon on your Desktop. Double-click the CD-ROM icon to explore it. You will find the Windows software installer inside the **Alexandria v6.x Installers** folder.

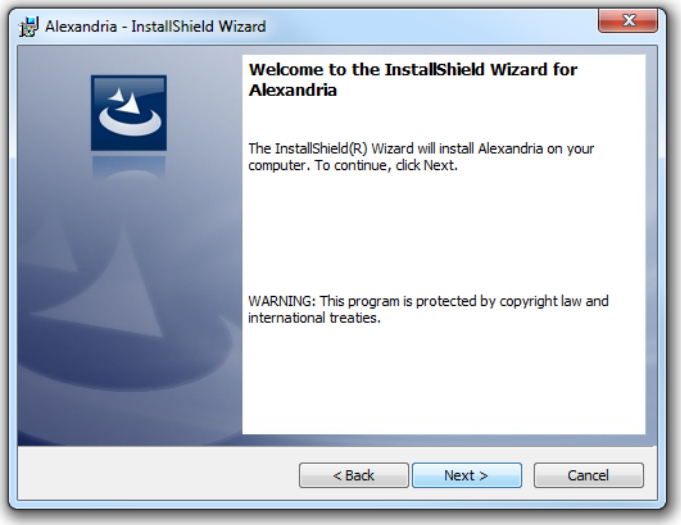


Step 2. The installer for your operating system will be located inside the **Windows Installers** subfolder. You can also visit COMPanion's website (`www.goalexandria.com`) and download the latest Alexandria installers there.

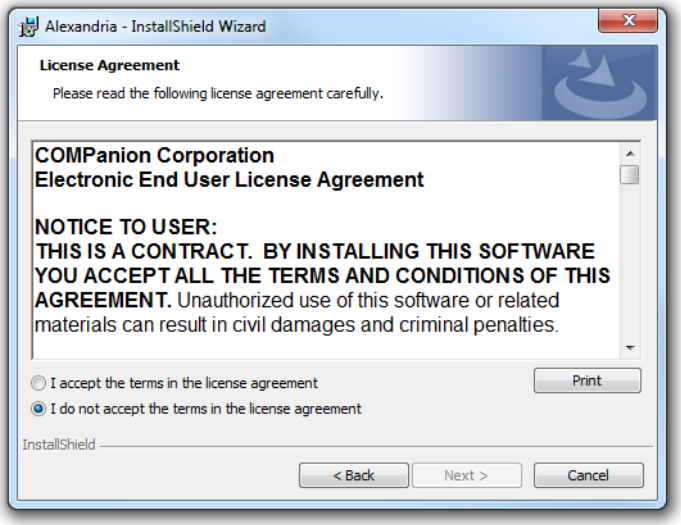
Step 3. Double-click on the file called **Alexandria Installer.exe**. When the **Alexandria Setup** splash screen appears, click **Next** to continue.



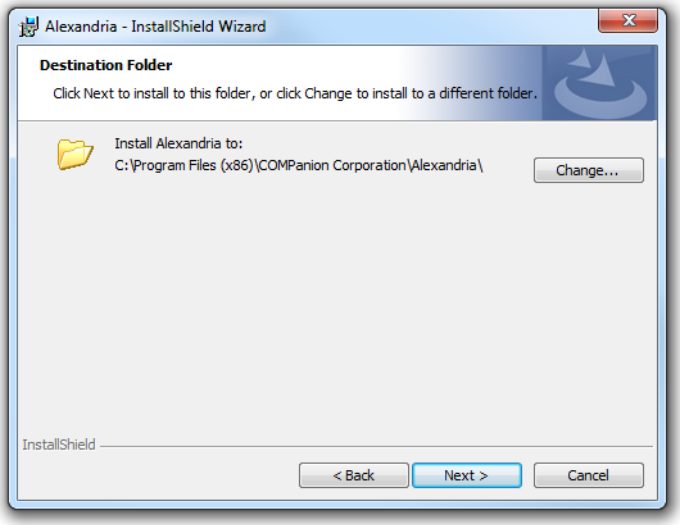
Step 4. On the **Welcome** window, click **Next** to continue.


Alexandria - InstallShield Wizard
Welcome to the InstallShield Wizard for Alexandria
The InstallShield(R) Wizard will install Alexandria on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

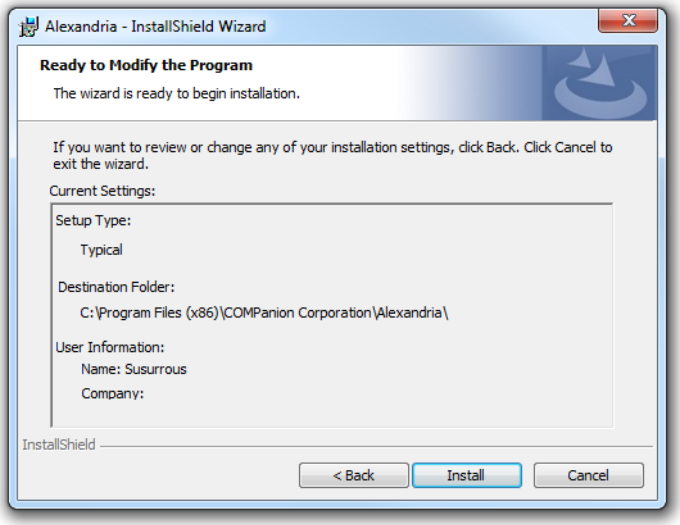
Step 5. Next, the COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and choose the **I accept the terms in the license agreement** option, followed by **Next**. If you *do not* accept the terms of the license, click the **Cancel** button.


Alexandria - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
COMPanion Corporation
Electronic End User License Agreement
NOTICE TO USER:
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT. Unauthorized use of this software or related materials can result in civil damages and criminal penalties.
I accept the terms in the license agreement
I do not accept the terms in the license agreement
Print
InstallShield
< Back
Next >
Cancel

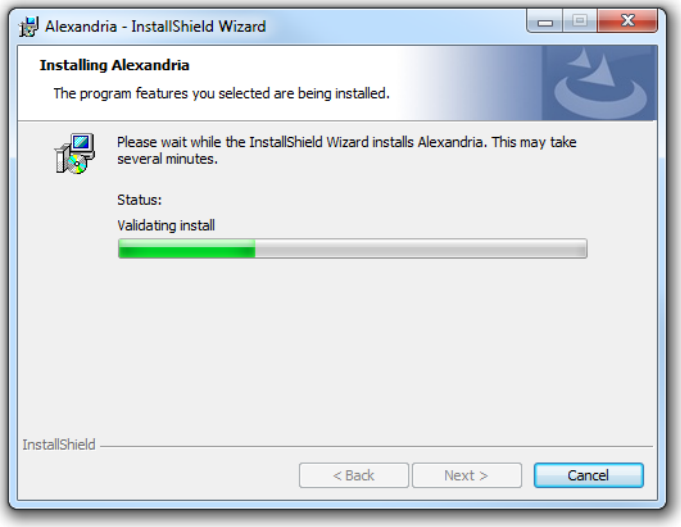
Step 6. When the following window appears, verify that the **Destination Folder** correctly indicates the location where you want Alexandria installed. The default is either the **Program Files** or the **Program Files (x86)** directory, depending on if you're running a 32 or 64-bit version of Windows; this is typically the best location to install Alexandria. Click **Next**.


Alexandria - InstallShield Wizard
Destination Folder
Click Next to install to this folder, or click Change to install to a different folder.
Install Alexandria to:
C:\Program Files (x86)\COMPanion Corporation\Alexandria\
Change...
InstallShield
< Back
Next >
Cancel

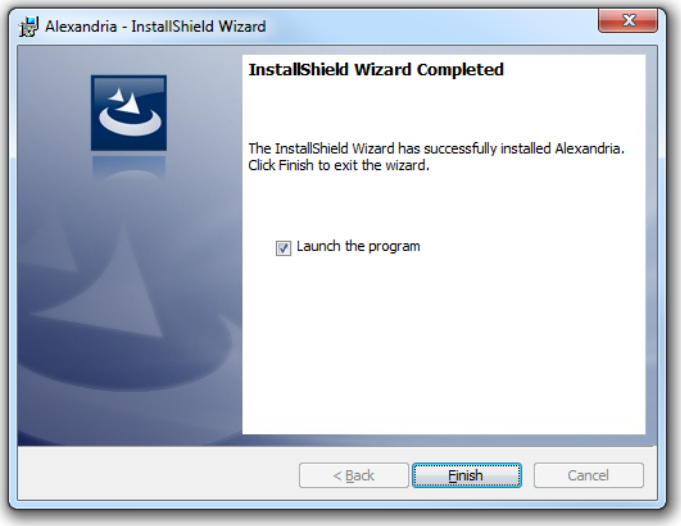
Step 7. On the **Ready to Install** window, click **Install** to continue.



Step 8. During installation, a window similar to the following will update you on the installer's progress. To abort the installation, click the **Cancel** button.

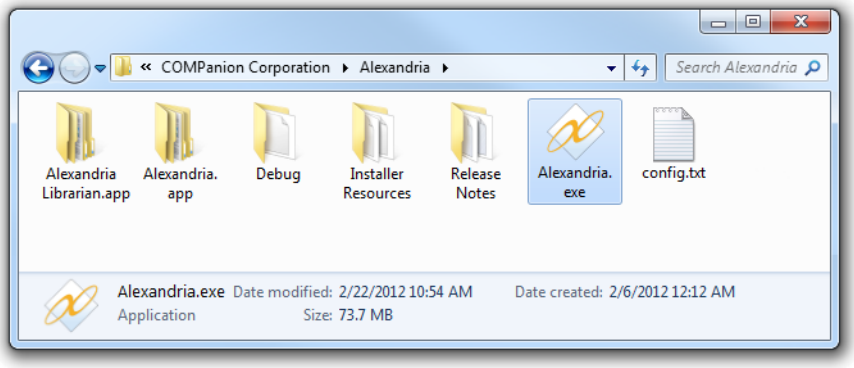

Alexandria - InstallShield Wizard
Installing Alexandria
The program features you selected are being installed.
Please wait while the InstallShield Wizard installs Alexandria. This may take several minutes.
Status:
Validating install
InstallShield
< Back
Next >
Cancel

Step 9. When the installation is complete, a confirmation window will appear. Click **Finish**.



Step 10. Eject the COMPanion CD-ROM and store it in a safe place for future use.

Step 11. A **COMPanion Corporation/Alexandria** folder has been created and Alexandria is now installed. Below is an example of the window that appears after installation.



Step 12. Note: This *Getting Started Guide* is included on the Alexandria CD-ROM (in ".pdf" format) but is *not* installed with the application. You can double-click on the corresponding icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there; you can even place it in the **Links** menu folder *(see page 44 for more information)*.

If you don't have **Adobe's Acrobat Reader** installed on your machine, download the most current version for free from Adobe's website: `http://www.adobe.com/`

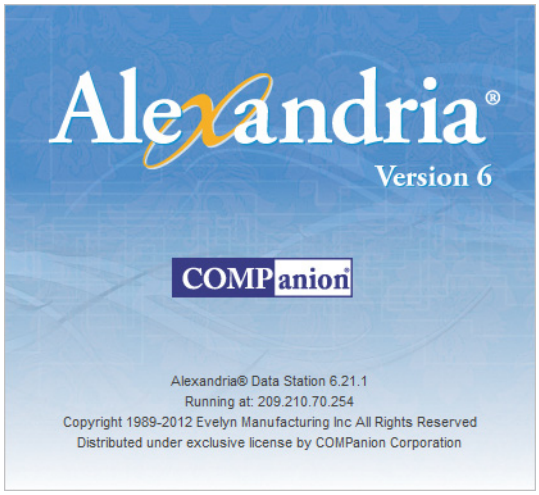
Step 13. Locate the newly installed **Alexandria** folder on your hard drive; inside the folder, double-click on the **Alexandria** icon to launch the program.

On a Windows XP, 2K, or 2K3 machine, this is located in the following directory:
Hard Drive *(typically C:)* > **Program Files** > **COMPanion Corporation** > **Alexandria**

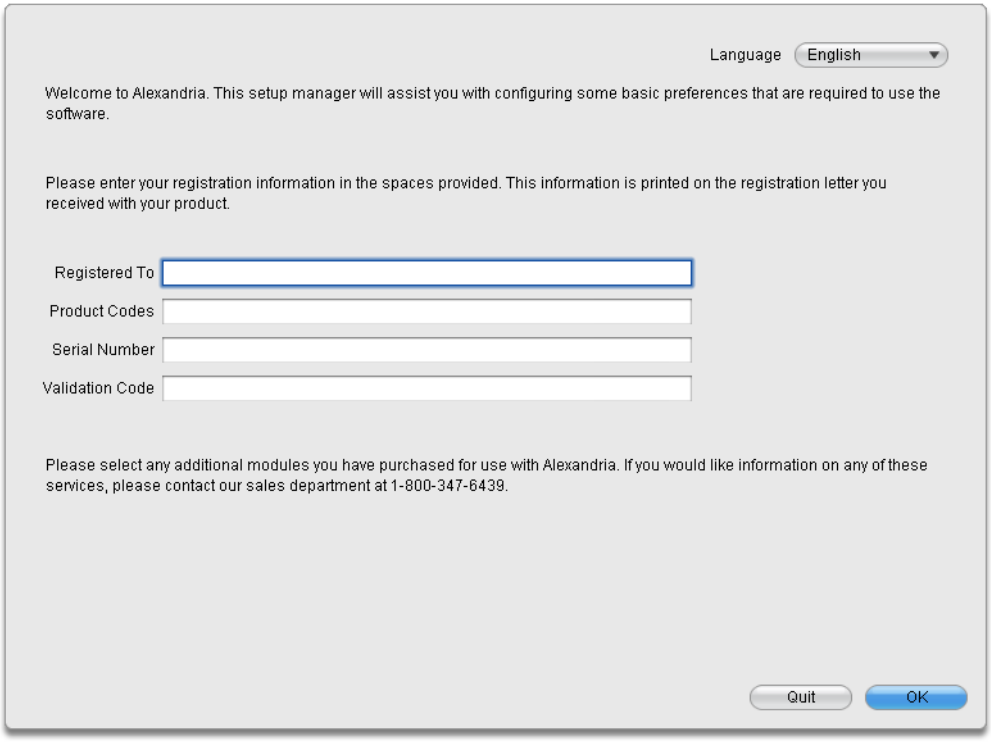
On a Windows 7 or Vista machine, this is located in the following directory:
Hard Drive *(typically C:)* > **Program Files (x86)** > **COMPanion Corporation** > **Alexandria**

Step 14. Alexandria should automatically start after installation. If it does not, double-click the **Alexandria** icon (located in one of the program folders described above) to start the program.

Step 15. When you start Alexandria, the following window appears. If you have not yet registered Alexandria, the registration window will appear (described in Step 16). Otherwise, the **Circulation** window *(page 211)* will appear.



Step 16. The first time you start the Data Station, enter your **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK** to continue.


Language
English
Welcome to Alexandria. This setup manager will assist you with configuring some basic preferences that are required to use the software.
Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product.
Registered To
Product Codes
Serial Number
Validation Code
Please select any additional modules you have purchased for use with Alexandria. If you would like information on any of these services, please contact our sales department at 1-800-347-6439.
Quit
OK

Step 17. That's it! You've installed your Alexandria Data Station. If you've purchased a single-user license, you're finished installing. If you've licensed additional clients, see "Installing Alexandria Librarians" on page 33.

If you're part of a Central Union and need to set up additional sites, see page 51

Step 18. If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: `support@companioncorp.com`

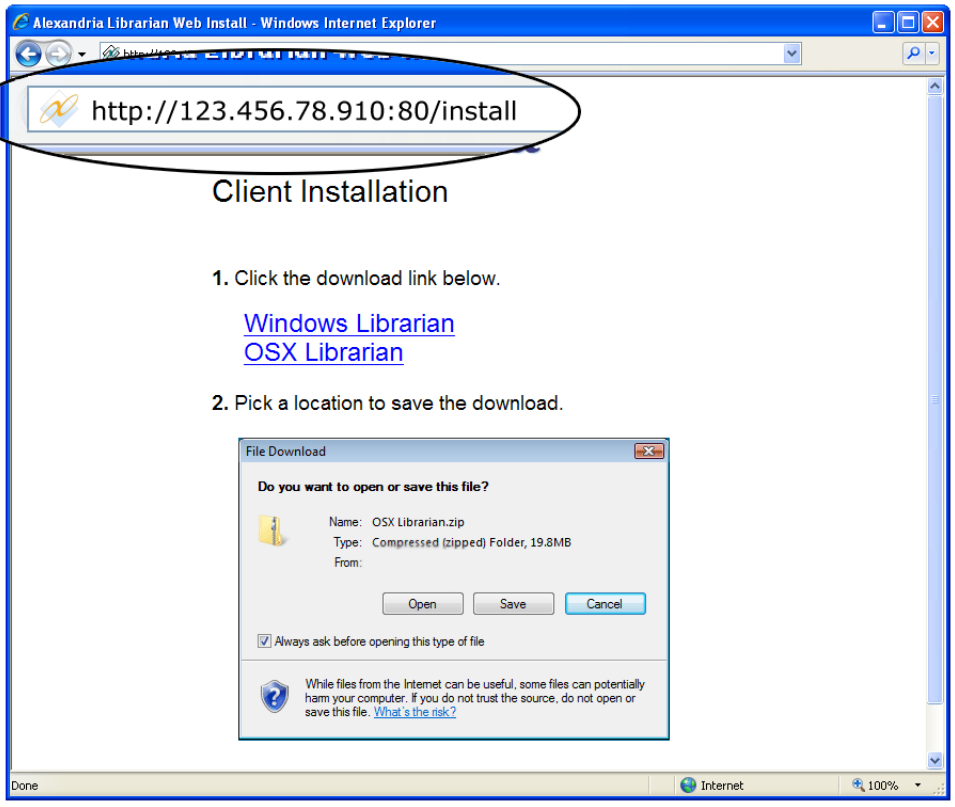
Installing Alexandria Librarians

If you have a license that supports multiple clients, you can install Librarian Workstations on other computers in your library. Alexandria installs clients over the *world wide web*; to do this, make sure that you've set up an operator with an **Administrator**-level **Security Group**, **User ID**, and **Password** in the **Patrons** management window of your main Data Station *(see "Adding Operators" on page 261)*. Otherwise, you can use the **System Administrator Special Operator** (barcode 10) *(see page 219)*.

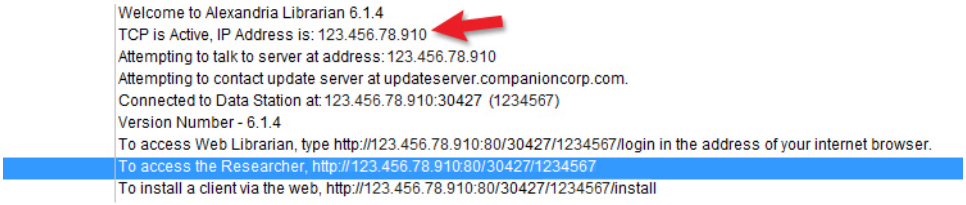
Step 1. Your main **Alexandria Data Station** must be running in order for you to install clients.

Step 2. Determine which computers will have Librarian Workstations installed. On those machines, open an internet web browser (e.g. Apple's Safari, Mozilla's Firefox, Google's Chrome, or Microsoft's Internet Explorer).

Step 3. In the **Address** field of your browser (typically located near the upper-left corner of the window), type the IP address of your main Alexandria Data Station, followed by your web services Port ID (usually 80), and then "`/install`".


Alexandria Librarian Web Install - Windows Internet Explorer
http://123.456.78.910:80/install
Client Installation
1. Click the download link below.
Windows Librarian
OSX Librarian
2. Pick a location to save the download.
File Download
Do you want to open or save this file?
Name: OSX Librarian.zip
Type: Compressed (zipped) Folder, 19.8MB
From:
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
Done
Internet
100%

If you are not sure what IP address your Data Station uses, it appears in your **Transaction log** each time Alexandria is launched. It is located approximately three or four lines down and will display **TCP Is Active, IP address is:** [your IP address here].


Welcome to Alexandria Librarian 6.1.4
TCP is Active, IP Address is: 123.456.78.910
Attempting to talk to server at address: 123.456.78.910
Attempting to contact update server at updateserver.companioncorp.com.
Connected to Data Station at 123.456.78.910:30427 (1234567)
Version Number - 6.1.4
To access Web Librarian, type http://123.456.78.910:80/30427/1234567/login in the address of your internet browser.
To access the Researcher, http://123.456.78.910:80/30427/1234567
To install a client via the web, http://123.456.78.910:80/30427/1234567/install

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact the COMPanion Technical Support team.

Step 4. If you performed the latter step correctly, the **Alexandria Client Installation** page should appear, requiring that you input your **Log In User ID** and **Password**. Your [operator] user name and password are the same as those configured in the **Patrons** *(see page 261)* management window of your main Alexandria Data Station.

Step 5. From the provided links, select the appropriate Librarian Workstation to install: **Windows Librarian** or **OSX Librarian**.

Step 6. The client installer will be downloaded to your machine. After it has finished downloading, a zipped **Workstation** folder with the appropriate **Alexandria Librarian** files inside can be uncompressed anywhere on your computer.

Step 7. Double-click on the **Alexandria Librarian** icon to launch your workstation.

- NOTE -

Make sure that **Port 80** and **Port 30427** are open on your firewall; these ports are used for web access and client-server communications (i.e. communications between the Data Station and Librarians/Researchers). If you don't have the proper authorization or are not familiar with ports and firewalls, please contact your system administrator or other qualified individuals in your organization to help you get set up. If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service.

Librarian Workstation Client Installer Resources

The first time your main Data Station is launched, Alexandria will automatically verify (via internet connection to COMPanion's update server) that you have the proper OSX and Windows client **Installer Resources** for Librarian Workstations in your **Alexandria Support** folder. These compressed files are necessary for creating new Librarian Workstations for Macintosh or Windows machines.

You should *always* have the client resources for the operating system that your Data Station was installed on; these are created during the installation process. For example, if your main Data Station was installed on a Windows machine, then the *Win Librarian* client resources were automatically created during installation—and vice versa. However, additional client resources will *have* to be downloaded.

By default, this is typically a passive process; missing resources are automatically downloaded when the **Automatically Download Missing Resources** box is checked in your **System Preferences** -> **Network Services** -> **Updates** -> **Server Updates** *(see page 48)*. This preference ensures that you always have the latest versions of the client resources on startup.

However, if you don't have a persistent internet connection or you purposely keep your Data Station disconnected from the internet, but want Librarian Workstations to connect to your main Data Station via internal LAN, you'll have to manually place these installer resources into your **Alexandria Support** folder *(see page 8)*. If this is necessary, please contact our Technical Support team and follow their step-by-step instructions.

If you're confident that you can perform these steps without guidance, client **Installer Resource** files can be downloaded from the Alexandria website: *www.goalexandria.com*.

Configuring Alexandria's Web Librarian

Those who use Alexandria's Web Librarian will have the ability (if their **Security Group** level permits) to run certain utilities, reports, and change preferences for the Data Station over the *world wide web*. However, operators attempting to access these features must have the proper **Administrator**-level type **Security Group** permissions.

Step 1. Under the **Edit** menu, select **System Preferences** (Cmnd/Ctrl+;).

Step 2. In the **System Preferences** window, select the **System** icon.

Step 3. In the **Web Settings** tab, use the **Web Options** and **Web Settings** subtabs to configure the settings for operators who will be accessing Alexandria's Web Librarian over the internet *(see "Web Settings tab: Options subtab" on page 81)*.

Step 4. To access the Web Librarian, launch your default web browser (e.g. Apple's Safari, Mozilla's Firefox, Google's Chrome, or Microsoft's Internet Explorer).

Step 5. In the address field of your browser window, enter the IP address of your Data Station (the IP address is displayed in Alexandria's transaction log when you first launch the Data Station) or DNS name assigned to that IP address by your system administrator. The address field is typically located near the top-left corner of the browser window and is usually labeled either **Address**, **Location**, or **Go To**.

Step 6. If you changed the **Port ID (usually 80)** value when setting the **Web Settings** system preferences, type a colon followed by the port number at the end of your *www* address. For example, if the location of your Data Station is (`www.alexweb.com`) and you changed the port value from 80 to 81, type "`www.alexweb.com:81/`" in the **Address** field (without the quotation marks).

- NOTE -
If you are not familiar with browsers, domain names, IP addresses or other information mentioned above, see your system administrator or other qualified individuals in your organization to help you get set up.

Alexandria Basics

This chapter describes the main system menus and basic operational rules used in Alexandria.

Alexandria menus follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Alexandria are very similar to the **File** and **Edit** menus in other applications. Additional menus have purposes specifically related to library management.

Alexandria has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle deviations between the controls at the tops of windows and minor differences in operating system functionality, the program looks and operates identically across both Macintosh and Windows platforms.

However, these operating systems *are* different, therefore, there are some variations between environments. For example, on the Macintosh you press the <Cmnd> key for menu shortcuts and in Windows you select the <Ctrl> key. Windows and Macintosh have different controls for minimizing, closing, and resizing windows. In order to keep our documentation as clear as possible, this guide will generally discuss actions rather than operating system-specific commands or controls.

Rather than "click the red close box at the upper-right of your window," this guide will read "close the window," and allow the operator to select the operating system-specific commands required to control Alexandria.

This guide contains images from both Windows and Macintosh versions of Alexandria.

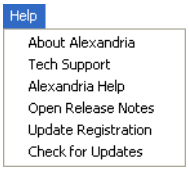
Macintosh & Windows Command Differences

Macintosh Command Key	Windows Command Key	Usage
<Cmnd>	<Ctrl>	Perform menu shortcuts.
<Option-Tab>	<Ctrl-Tab>	Perform Authority Control.
<Option>	<Ctrl>	Display Tool Tip.
<Option>	<Alt>	Used to modify commands.

The following sections describe some basic operational elements found in Alexandria.

Alexandria Online Help

Almost every window in Alexandria has a special, round **Online Help** button; clicking this button opens your default web browser to the related **Online Help** page. These pages contain information directly related to the area of Alexandria you are using and explain, in detail, how to use them.

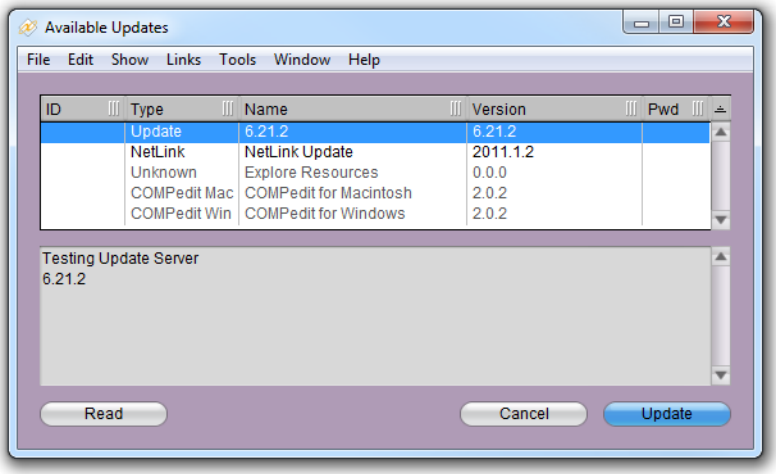


Help Menu

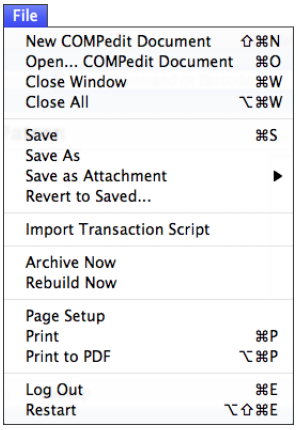
On Macintosh, there is an **Alexandria** system drop-down menu that contains the **About Alexandria** and **Tech Support** selections. There is also a **Help** menu that contains the **Alexandria Help**, **Open Release Notes**, **Export Resources**, **Update Registration**, and **Check for Updates** selections.

On Windows, all these selections are located under the **Help** menu.

- **About Alexandria—**Shows copyright and version information.
- **Tech Support—**This opens the **Email** subtab under the **Support** tab of the main **Circulation** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don't have your own SMTP (simple mail transfer protocol) address configured *(see "SMTP tab" on page 152)*.
- **Alexandria Help—**This button opens your default web browser to the main index page of Alexandria's **Online Help**.
- **Open Release Notes—**If the most current release notes are available, this selection will display them. When available, this document is located in your **Alexandria Support** folder with the filename "*Alexandria Release Notes*".
- **Update Registration—**This will open Alexandria's **Registration** window, allowing you to update your registration information. Alexandria will require a restart after your registration information has been updated.
- **Check for Updates—**This selection will check for any available Alexandria updates; when new updates are available, they will be presented and you will have the option of choosing which you would like installed. You should archive your data before performing an update; we recommend that you **Read** the release notes thoroughly beforehand to ensure that your hardware meets the minimum system requirements and so that you are aware of any major software enhancements.



File Menu



The Alexandria **File** menu provides the following selections:

- **New COMPedit Document** (Cmnd/Ctrl+Shift+N)—Opens a new COMPedit document; COMPedit is Alexandria's integrated word processor *(see "COMPedit: The Alexandria Word Processor" on page 46)*.
- **Open... COMPedit Document** (Cmnd/Ctrl+O)—Opens your standard operating system explorer window used to locate files. When you select a document from this window, Alexandria will open it (if it is able). Use this command to open COMPedit documents, *.txt* documents, MARC documents, MicroLIF documents and other files for viewing.
- **Close Window** (Cmnd/Ctrl+W)—Closes the topmost Alexandria window.
- **Close All** (Cmnd/Ctrl+Alt+W)—Closes *all* Alexandria windows except for **Circulation**.

- **Save** (Cmnd/Ctrl+S)—Saves the contents of the topmost Alexandria window.
- **Save As**—Allows you to save *.vwp* documents to specific locations on your hard drive.
- **Save as Attachment**—This allows you to attach the content of any COMPedit *.vwp* document to a **Tech Support Message** using the **Email** subtab under the **Support** tab of the main **Circulation** window. You may also attach an **Item** or **Patron** record as an attachment when you send an email to our Technical Support service department.
- **Revert to Saved...**—Changes made to the current record are discarded and the original content is restored in the window.

- **Import Transaction Script**—If you use a portable laser scanner for specific library duties (e.g. inventory) and have downloaded the data to your hard drive, use this command to process the script and import your data into Alexandria.

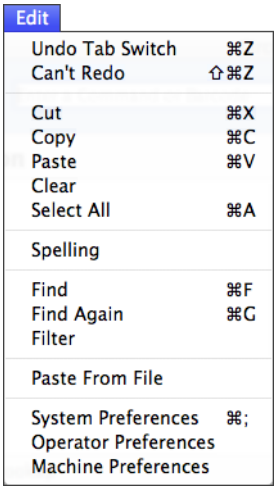
- **Archive Now**—Performs an immediate backup of your valuable Alexandria Data. For more information on archiving, please review "How Archiving Works" on page 63.
- **Rebuild Now**—Performs an immediate **Rebuild** of your current Alexandria Data. Before rebuilding, Alexandria will ask if you would like to perform an archive first *(strongly recommended)* and then ask if you would like to restart Alexandria after a successful rebuild. You will be unable to perform any duties on your Data Station or Librarian Workstation(s) while your database is rebuilding.

- **Page Setup**—Operating system standard function that prepares the page for printing.
- **Print** (Cmnd/Ctrl+P)—Prints the information contained in the window that has focus (i.e. the topmost window in the forefront). For example, if the **Patrons** management window has focus, information for the selected patron is printed when this command is selected. If the **Circulation** window has focus, then the transaction log is printed.
- **Print to PDF** (Cmnd+Option+P)—This allows you to save any finished reports or COMPedit world processor documents as an Adobe *.pdf* file (Macintosh only).

- **Log Out** (Cmnd/Ctrl+E)—This command closes the **Circulation** window and disallows anyone without proper authorization to access **Alexandria**. Instead, an **Alexandria Log In** window appears, awaiting a correct **User ID** and **Password**. If a high-level user steps away from the Data Station and doesn't want to quit or restart Alexandria, the **Log Out** function provides this security. You must have security enabled in order for this option to work *(see "Also, you are allowed to add or subtract a number of days from each adaptive date selection. For example, `%td - 5` will take today's date and subtract five days. Further, `%tm + 20` will take tomorrow's date and add twenty days." on page 49 for more information)*.
- **Restart** (Cmnd/Ctrl+Alt+Shift+E)—Logs out the current operators, closes all windows, restarts the Alexandria program, and if security is activated, brings up the **Alexandria Log In** window. If no security has *not* been activated, Alexandria just restarts to the **Circulation** window.

- **Quit/Exit Alexandria** (Cmnd/Ctrl+Q)—Quits the Alexandria program.

Edit Menu



This menu contains standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to Alexandria are detailed below.

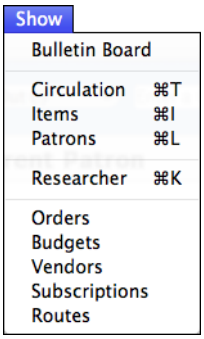
- **Undo** (Cmnd/Ctrl+Z)—This command only undoes typing or cut-and-paste operations in individual fields or in the COMPedit word processor. It does *not* undo operations from other menus, utilities, commands, or controls.
- **Redo** (Cmnd/Ctrl+Shift+Z)—An undo for the undo.

- **Cut, Copy and Paste**—You can cut, copy, and paste text from certain fields to other fields within Alexandria. For example, you can cut text from the **Title** field and place it in the **Notes** field. You can *not* cut and paste entire library records. If you need to transfer entire records into another application, use the **Export** function to save the records you need in a format compatible with that program.
- **Clear**—Clears the selected text or selected list elements.
- **Select All** (Cmnd/Ctrl+A)—Selects all the text in the current edit field, current COMPedit document, or list.

- **Find** (Cmnd/Ctrl+F)—This selection opens the **Find** window. Depending on which window has focus, **Find** can be used to locate a specific record from your database or text in a COMPedit word processing file.
- **Find Again** (Cmnd/Ctrl+G)—Finds the next matching record or data in the word processor.
- **Filter**—Opens the **Filter** window which allows you to locate specific information in a COMPedit document.

- **Paste From File**—Allows an operator to paste information from a file.

- **System Preferences** (Cmnd/Ctrl+;)—This selection opens the **System Preferences** window, which is used to customize Alexandria to suit your needs *(see "Introduction to Preferences" on page 59)*.
- **Site Preferences**—This selection opens the **Site Preferences** window, a way of setting "local" preferences, tied to a specific site *(see "Introduction to Preferences" on page 59)*.
- **Machine Preferences**—This selection opens the **Machine Preferences** window, where you can apply hardware settings to just one computer.



Show Menu

Use this menu to move between various Alexandria services and modules such as **Patrons**, **Items**, and **Circulation**. For example, if you need to manage patron information, select **Patrons** from the **Show** menu. To check items out or perform other transactions, select **Circulation** (Cmnd/Ctrl+T).

Most of the selections in the **Show** menu have a corresponding section in this guide; refer to each specific section for detailed information about how each functions.

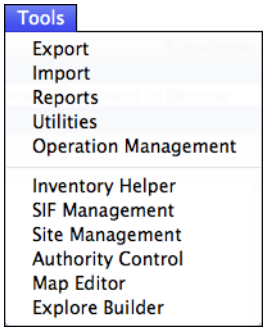
- **Bulletin Board**—Used to create an electronic library bulletin board. Librarians can "post" items on the **Bulletin Board**, which all patrons can view via the Researcher Workstation. The **Bulletin Board** also allows the librarian to associate notes or library maps with item call numbers. Thus, when circulated item details are displayed, if an associated note or library map is available, it's automatically included *(for more information, please review the "Bulletin Board" section of Alexandria's Online Help)*.

- **Circulation** (Cmnd/Ctrl+T)—Shows the **Circulation** window. Select this option if you want to check out, check in, place holds, charge fines, place reservations, accept payments, or perform inventory and other circulation functions. The **Circulation** window is *always* open while Alexandria is running; use this menu selection to bring it to the forefront.
- **Items** (Cmnd/Ctrl+I)—Opens/shows the **Items** management window; use this window to examine, add, modify, or remove title or copy records from your library.
- **Patrons** (Cmnd/Ctrl+L)—Opens/shows the **Patrons** management window; use this window to examine, add, modify, or remove patron or operator records.

- **Researcher** (Cmnd/Ctrl+K)—Opens/shows the Researcher Workstation *(see "Researcher Workstations" on page 233)* window in your default web browser. Select this command to browse your online public access catalog (i.e. OPAC).

- **Orders**—Opens/shows the **Orders** management window; use this window to examine, add, modify, or remove order records.
- **Budgets**—Opens/shows the **Budgets** management window; use this window to examine, add, modify, or remove budget records.
- **Vendors**—Opens/shows the **Vendors** management window; use this window to examine, add, modify, or remove vendors.
- **Subscriptions**—Opens/shows the **Subscriptions** management window. Select this command to examine, add, modify, or remove subscription records.
- **Routes**—Opens/shows the **Routes** management window. Select this command to examine, add, modify, or remove route records.

Tools Menu

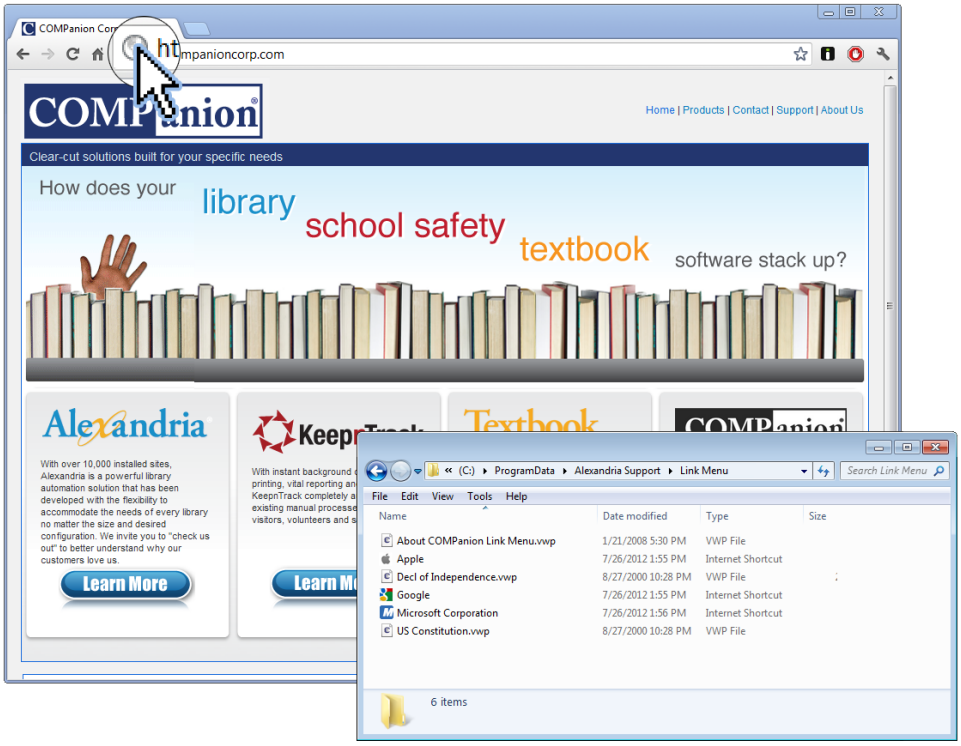


- **Export**—Opens the **Export** utility, allowing you to export items, patrons, or other miscellaneous data from the Alexandria database.
- **Import**—Opens the standard operating system explorer window used to locate files. Import files can also be "dropped" onto the **Circulation** window.
- **Reports**—Opens the **Reports** window, allowing you to create, find, duplicate, schedule, remove, or browse report categories (and subcategories) such as **Titles**, **Patrons**, or **Circulation** *(see "An Introduction to Reports" on page 198)*.
- **Utilities**—Opens the **Utilities** window, allowing you to make global changes to batches of information in your Alexandria database *(see "Performing Utilities" on page 203)*.
- **Operation Management**—Opens the **Operation Management** window, where reports delivered to the Data Station are available for viewing from any connected client workstation. Reports queued in the system are also available for operators so they can prioritize or remove them, etcetera *(for more information, please review the "Operation Management" section of Alexandria's Online Help)*.

- **Inventory Helper**—Opens the **Inventory Helper** window, allowing you to inventory, modify, and print reports for all the items in your collection *(for more information, please review the "Inventory Helper" section of Alexandria's Online Help)*.
- **SIF Management**—Opens the **SIF Management** window, allowing you to set up and manage your **Schools Interoperability Framework** (SIF), an industry-supported technical protocol that ensures that diverse primary and secondary (K-12) instructional and administrative software applications share information (data formats) and work together seamlessly *(for more information, please review the "SIF Management" section of Alexandria's Online Help)*.
- **Site Management**—Opens the **Sites** management window, allowing you to manage **Site ID Codes** and provide information pertaining to your school or each of the individual schools in your **Central Union**.
- **Authority Control**—Opens the **Authority Control** window. Select this command if you would like to find, add, duplicate, remove, or view the authority-controlled fields in your database.
- **Map Editor**—Opens the **Map Editor** window and allows you to attach a picture or map of your library to Alexandria **Bulletin Boards** *(for more information, please review the "Map Editor" section of Alexandria's Online Help)*.
- **Explore Builder**—Opens the **Explore Builder** window, allowing you to create a fun and attractive iconic interface which patrons can use to search library collections and other such activities.

Links Menu

The **Links** menu provides an easy way for you to quickly jump to other programs and *world wide web* resources that may be required for your work.


COMPanion
Home | Products | Contact | Support | About Us
Clear-cut solutions built for your specific needs
How does your
library
school safety
textbook
software stack up?
Alexandria
Learn More
Textbook
(C:) ▸ ProgramData ▸ Alexandria Support ▸ Link Menu
File Edit View Tools Help
Name
Date modified
Type
Size
About COMPanion Link Menu.vwp 1/21/2008 5:30 PM VWP File
Apple 7/26/2012 1:55 PM Internet Shortcut
Decl of Independence.vwp 8/27/2000 10:28 PM VWP File
Google 7/26/2012 1:55 PM Internet Shortcut
Microsoft Corporation 7/26/2012 1:56 PM Internet Shortcut
US Constitution.vwp 8/27/2000 10:28 PM VWP File
6 items

The **Link Menu** folder is automatically created in your **Alexandria Support** folder. Any document, program, URL, shortcut, or alias you place in this folder gets displayed in the **Links** menu. When you make a selection from this menu, that linked document, program, URL, shortcut, or alias is launched.

The contents of the main **Link Menu** folder on the Data Station are automatically copied to the **Link Menu** folder of each Librarian Workstations the very first time *that* client Workstation is launched. After the **Link Menu** folder has been initially created, any changes made to a particular Workstation's **Link Menu** folder are for *that* Workstation *only*.

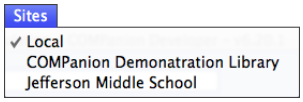
If the **Link Menu** folder is deleted, the Workstation will create a new one the next time the Librarian is launched and the default documents, programs, URLs, shortcuts, or aliases will again be automatically copied from the Data Station.

URL links (pictured above) are generally the little "favicons" found just before the http address in the address bar field of your default internet browser. Drag and drop any program shortcut (alias) or URL into the **Link Menu** folder to make them appear in the **Links** menu.

- NOTE -

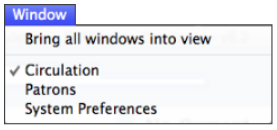
If you are licensed to use Alexandria's **netTrekker** and **SearchALL** functionality, hyperlinks to their respective websites will automatically appear in the **Links** menu.

Sites Menu (District Librarian only)



The **Sites** menu allows you to select which Data Station you would like to connect to. When a District Librarian connects to a hosted Data Station, it performs *exactly* like a Librarian Workstation installed for that Data Station *(for more information, please review the "District Librarian" or "Central Union" section of Alexandria's Online Help)*.

Window Menu



As you open new windows in Alexandria, the **Window** menu will contain a list of all currently active windows. The example **Window** menu in the margin shows that the **Circulation** window is open and active and the **Patrons** and **System Preferences** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the **Circulation** window.

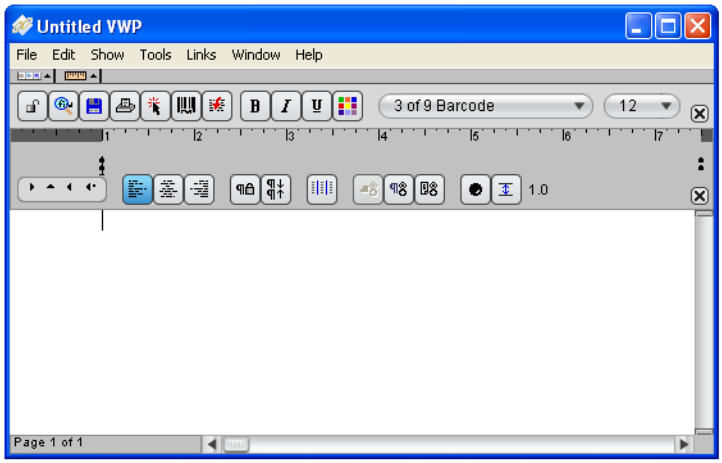
When you close a window, it is removed from this menu.

COMPedit: The Alexandria Word Processor

Integrated into Alexandria is COMPedit, a powerful word processor. These days, everyone owns at least one word processor. Why, then, is the Alexandria approach to an integrated word processor any different? Well, here are a number of reasons:

- COMPedit is available integrated within Alexandria *and* as a stand-alone product.
- The word processor can be used throughout Alexandria to display reports and other informational windows. In most other programs, this information is displayed in a static system window.
- Allows operators to save reports for future reference. COMPedit documents can be viewed, edited, saved and later printed.
- Allows users to customize reports. You can pick the font, eliminate unwanted information, enter notes, change the font size, update the heading, and much more. You can produce the reports *you* want—done *your way*.
- Quickly create your *own* reports by cutting and pasting pieces of information from different Alexandria reports.
- Send reports to others via email attachments—since you can save reports electronically, you can send them electronically too.
- COMPedit uses a highly efficient virtual memory scheme, which allows it to support *very* large documents in a limited amount of memory. Therefore, you can view large import files before you import them—even 100MB files!
- Since most reports can be created as word processor documents, you can preview each report before you print them. Other word processors might allow you to view reports on-screen, but usually only one page at a time, or a very limited page range. With COMPedit, you can see it all.
- COMPedit can provide your institution with a standard, cross-platform tool for creating and exchanging reports. All documents are supported for both Macintosh and Windows-based operating systems—a document created on one system can be viewed on the other.
- Alexandria can prepare several reports for printing simultaneously. Most systems won't let you print more than one report at the same time—after all, in what order would the pages come out of the printer? With the Alexandria approach, all reports are prepared in COMPedit and can be printed at a later time.
- COMPedit has the ability to support picture files created in drawing or paint programs—just paste them into your document.
- Special support is specifically provided for code 39 barcodes so that they are printed at the highest possible resolution, at the highest possible quality setting your printer is capable of handling.

To create a new COMPedit document, select **New COMPedit Document** from the **File** menu. You'll see a window similar to this one.



Since most people are familiar with word processors, COMPedit's basic operations will not be documented. However, here's a quick overview of some of the special features available with COMPedit.

- Use the icon above the vertical scroll bars to hide/show the word processor tools or show/hide the graphical ruler.
- Click on the lock icon to lock or unlock the document. Locked documents can *not* be modified.
- Use the other icon controls to find text, save a document, print your document, set a page break, insert the date, insert the time, insert the current page number, etc.
- Indents, margins, justification, and decimal tabs are supported.
- **Left**, **Center**, and **Right** aligned paragraphs are supported.
- **Font**, **Size**, and **Style** controls are available for any character. Style includes colored text.
- Paragraph "keep together" controls are supported.
- Supports headers and footers. To create a header or footer, drag the controls above and below the vertical scroll bars to create a header or footer area.
- Supports restricted column viewing for tabbed columns. When this is turned on, text that might overflow into another column is visibly truncated so that printed columns look nice. Since the data is still in the report, adjusting column width will expose more data. This is a very useful feature for viewing tabular-type reports.
- Supports internal hot links for URLs, COMPedit links and multi-media display (Ctrl/Cmnd-click on a URL in COMPedit to open the link in your default browser). This capability is currently only available for documents created by or within Alexandria.
- You can move your COMPedit documents to other word-processing programs using the **Save As Text** option. However, you'll lose all document formatting. Inversely, you can move other word-processing documents into COMPedit using *their* **Save As Text** option; COMPedit can open all standard `.txt` documents. However, you'll lose all document formatting.

NOTE:
Make sure to read the Read-Me file thoroughly for important information regarding the update.

Performing Alexandria Software Updates

If you have an internet connection, there are several ways you can perform software updates from within Alexandria using COMPanion's **Update Server**.

The easiest method is to select **Check For Updates** from the main system **Help** menu. However, you can also use the **Check for Program Updates Now** button, located in your **Updates System Preferences** or perform the **Check for Updates** utility.

No matter which of these methods you choose, it will open the **Available Updates** window; from there, you can choose to immediately update your Alexandria Data Station or wait for a future date. If an update is available, a description of the update can be found by selecting (i.e. highlighting) the update and clicking on the **Read** button.

If you are sure you want to update to the newest version of Alexandria, select (i.e. highlight) the update from the list and click the **Update** button.

You can also download the newest COMPanion and Alexandria software updates from the official website (`www.companioncorp.com`). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Alexandria registration name, email address, school/company and serial code in order to proceed with the download; these can be found on the registration letter you received when you licensed Alexandria or when you renewed your support contract.

If you have accidentally misplaced your registration letter, COMPanion's 24 hour Technical Support team will be able to assist you.

If you don't have a reliable internet connection (or are unable to download the newest updates), you can contact COMPanion (via email or Tech Support at 800-347-4942) and request that an Alexandria Update CD-ROM be sent to your location.

Adaptive Dates

An adaptive date can be substituted for an actual date *anywhere* within Alexandria; however, adaptive dates are mostly used with exports, utilities, and reports.

Here are the terms you can substitute for an actual date in the Alexandria **Date Range** selection fields:

%today or **%td —** Entering these commands into a date field is the same as entering today's date. For example, if today's date is October 3, 2012, then entering `%td` or `%today` is the same as entering `10/3/12`.

%yesterday or **%yd —** Entering these commands into a date field is the same as entering yesterday's date. For example, if yesterday's date was April 6th, 2012, then entering `%yd` or `%yesterday` is the same as entering `4/6/2012`.

%tomorrow or **%tm —** Entering these commands into a date field is the same as entering tomorrow's date. For example, if tomorrow's date is April 8th, 2012, then entering `%tm` or `%tomorrow` is the same as entering `4/8/2012`.

%lastweek or **%lw —** Entering the `%lw` or `%lastweek` command will subtract seven days from today's date. For example, if the current date is April 7th, 2012, then entering `%lw` or `%lastweek` is the same as entering `3/31/2012` (March 31st, 2012).

%nextweek or **%nw —** Entering the `%nw` or `%nextweek` command will add seven days from today's date. For example, if the current date is April 7th, 2012, then entering `%nw` or `%nextweek` is the same as entering `4/14/2012` (April 14th, 2012).

%lastmonth or **%lm —** Entering the `%lm` or `%lastmonth` command will subtract thirty days from today's date. For example, if the current date is April 7th, 2012, then entering `%lm` or `%lastmonth` is the same as entering `3/8/2012` (March 8th, 2012).

%nextmonth or **%nm —** Entering the `%nm` or `%nextmonth` command will add thirty days from today's date. For example, if the current date is March 8th, 2012, then entering `%nm` or `%nextmonth` is the same as entering `4/7/2012` (April 7th, 2012).

%lastyear or **%ly —** Entering these commands into a date field is the same as entering today's date, but last year. For example, if today's date is April 7th, 2012, then entering `%td` or `%today` is the same as entering `4/7/2011`.

%nextyear or **%ny —** Entering these commands into a date field is the same as entering today's date, but next year. For example, if today's date is April 7th, 2012, then entering `%td` or `%today` is the same as entering `4/7/2013`.

Also, you are allowed to add or subtract a number of days from each adaptive date selection. For example, `%td - 5` will take today's date and subtract five days. Further, `%tm + 20` will take tomorrow's date and add twenty days.

Notes:

Sites Management Window

- NOTE-

You are not allowed to duplicate or add additional sites if you are a single site license. You *must* be registered for multiple sites in order to use **Central Union**—a special configuration of Alexandria; *see page 2 for more information*. Please contact the COMPanion Sales department at *(800)-347-6439* if you would like to increase your license limit and upgrade to a **Central Union**.

What is Site Management?

If you manage a single site collection, you will only ever have information for your *one* site in the **Sites** management window. However, Alexandria also has the ability to mange multiple collections stored within a single database; we call this a **Central Union** (*see page 2)*. If you are part of a **Central Union**, information for *all* the individual sites in your district will be stored and maintained in the **Sites** management window.

In a **Central Union** environment, operators and patrons must be able to quickly differentiate data belonging to one collection over another. In order to achieve this, our software embeds patron and item records with something we call a **Site ID Code**.

Site ID Codes are used in several ways:

- To identify the collection for which a copy belongs.
- To identify the site for which a patron belongs.
- To determine whether a book-dropped copy was returned to the correct location or if it needs to be placed *in transit* and returned to the owning library.
- To determine copy availability at particular locations when placing holds and reservations.
- To filter a patron's Researcher search results to display only a particular collection (or group of collections) for which they are interested.
- Other areas affected by **Site Management** include **Acquisitions** (**Orders**, **Budgets**, **Vendors**, **Subscriptions**, and **Routes**), **Maps**, and **Bulletins**.

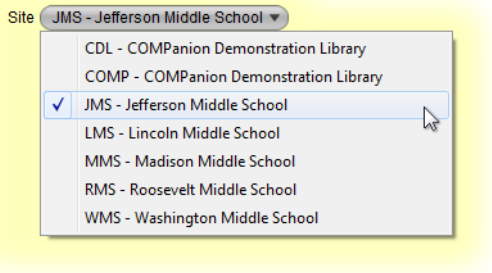
The Sites Management Window In More Detail

The **Sites** management window is where you configure or create **Site ID Codes** and provide information pertaining to either your single school or each of the individual schools in your **Central Union**.

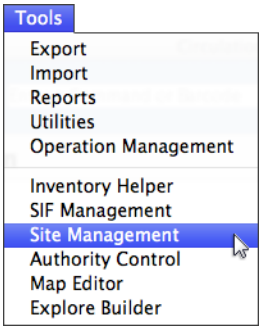
Your initial (or single) site record (including the default library name and address) is set by your registration information. Your address, city, state, postal code, country, telephone and fax data is used for return addresses on patron notices, for information shown on Researcher Workstations, and is included in emails sent to COMPanion's Technical Support team.

This address information will also be used as defaults when creating a new patron if no city, state, postal code, or country information is specified.

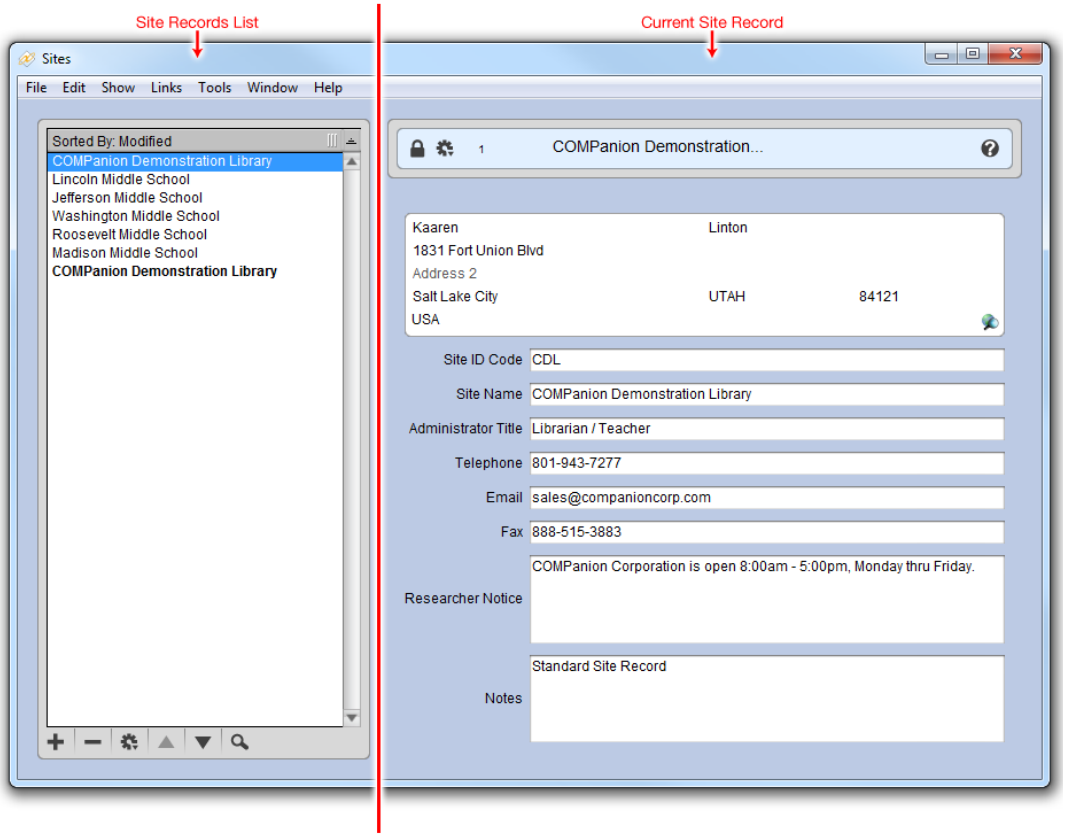
Once a new "site" has been created, it can be selected by any operator (depending on their **Security Group** and **Site Access** settings; *see page 259*) using **Site** drop-down menus found in the **Patrons** and **Items** management windows, the **Orders**, **Budgets**, **Vendors**, **Subscriptions**, and **Routes** windows, **Maps**, **Bulletins**, and the Alexandria Researcher. Valid and available sites are *always* pulled from **Sites** management window.


Site
JMS - Jefferson Middle School
CDL - COMPanion Demonstration Library
COMP - COMPanion Demonstration Library
JMS - Jefferson Middle School
LMS - Lincoln Middle School
MMS - Madison Middle School
RMS - Roosevelt Middle School
WMS - Washington Middle School

To open the **Sites** management window, select **Site Management** from the main **Tools** menu.



You can view, modify, add, and remove site information using the **Sites** management window and the commands in the **Actions** menu. By default, only operators with **District** or **Library Administrator** security levels may configure site information; for more about **Security Levels**, see page 69.



The **Sites** management window consists of a similar two-panel layout found in many of Alexandria's main management windows.

- The left-hand side of the **Sites** management window belongs to the **Site Records List**, used for browsing sites and other related tools.
- The larger, right-hand portion of the **Sites** management window consists of the **Current Site Record** pane where the currently selected site record is displayed, in full, along with associated **Tools** that help perform operations on said record.
- The site you are presently viewing is called the *current site*. If you are part of a **Central Union** environment, you will have multiple sites records to choose from. When you click on (i.e. select or highlight) a site from the **Site Records List** pane, that site's record information will be displayed in the **Current Site Record** pane on the right.

Site Records List and Associated Tools

The left-hand section of the **Sites** management window contains the **Site Records List** pane, where any site records matching an operator's **Find** (Cmnd/Ctrl+F) selection criteria will be displayed.

If you are a single site license, you are *not* allowed additional sites. Please contact the COMPanion Sales department at *(800)-347-6439* if you would like to increase your license limit and upgrade to a **Central Union**.

If you *are* part of a **Central Union**, use the **Site Records List** to browse through individual sites, starting with the site that is currently highlighted. Selecting (highlighting) a specific site from the **Site Records List** will make that site current in the right-hand section of the **Sites** management window.

Browsing the Site Records List

If you need to select a site preceding or following the one currently highlighted, use the options listed below to move backwards and forwards through the sites:

- To move to the previous record, either click on the up arrow or choose **Previous** under the **Actions** menu in the tools section of the window. If you prefer using keyboard shortcuts, you can use (Cmnd/Ctrl+[ ); these commands are shown to the right of the **Previous** menu selection in the **Actions** drop-down menu.
- To move to the next site, either click on the down arrow or choose **Next** under the **Actions** menu in the tools section of the window. If you prefer using keyboard shortcuts, you can use (Cmnd/Ctrl+[*)*; these commands are shown to the right of the **Next** menu selection in the **Actions** drop-down menu.
- Alternately, use the <up> or <down> arrow keys to move up and down through the list
- Stop on the site that you want to view, remove, duplicate, or modify.

- NOTE-

The **Previous** (Cmnd/Ctrl+[ ) or **Next** (Cmnd/Ctrl+]) commands are determined by the site that you are currently viewing. For example, if you change the current site's name, choosing **Next** will take you next name *after* the *changed* name—not what the name was *before* the change.

Associated Tools of the Site Records List

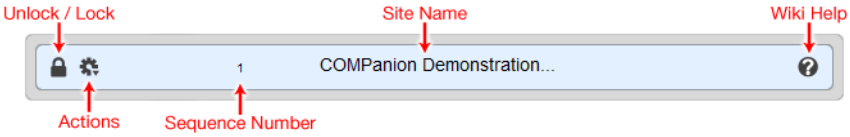
The area situated below the record list field contains several tools icons that are used for adding, removing, browsing, and finding sites *(for more information, please review the "Sites Management Window in More Detail" section of Alexandria's Online Help)*.

You are not allowed to duplicate or add any additional sites if you are a single site license. Please contact the COMPanion Sales department at *(800)-347-6439* if you would like to increase your license limit and upgrade to a **Central Union**.

Current Record Pane

The right-hand section of the **Sites** management window is dedicated to the current site record, which displays full details for the site selected from the **Site Records List** pane on the left.

At the top of the current site record pane is a long, rectangular area used for displaying status information; **Save** and **Revert**, the **Online Help** icon, the **Lock/Unlock** icon and a second **Actions** icon which contains functions specific/unique to the current record.



Unlock/Lock Icon—Before records can be modified, they must first be unlocked. For example, when the **Sites** management window is opened, the default state of the window is "locked". When locked, records can be viewed but *not* edited. Clicking on the lock icon unlocks the window; it stays unlocked until the operator clicks on the lock icon again or the window is closed.

Actions—This gear/cog menu contains record-specific actions and other tools that don't fit as well with the **Add**, **Remove**, and **Find** functions offered in the **Site Records List** gear icon.

- **Unlock/Lock Record** (Cmnd/Ctrl+U)**—**This selection locks/unlocks the window, it stays unlocked until the operator makes this selection again, or the window is closed.

Sequence Number—A unique number assigned to new sites by the program. If you are part of a **Central Union**, this number is useful for browsing sites by order of entry.

Online Help—Performs a **Sites** management window help query to our **Online Help** in an external browser window.

Current Record Pane (Continued)

This portion of the **Sites** management window is *always* visible regardless of which site you have selected from the **Site Records List**. Here you'll provide basic identification about your site: administrator name along with the site address, email, telephone and fax numbers.

Site Settings

Administrator Name—Enter the name of the current site's administrator or head librarian here; this is the name that appears at the bottom of form letters.

Address Information—Enter the site address, city, state, postal code, and country; this data is used for return addresses on patron notices, for information shown on the Researcher Workstation, and is included in emails sent to COMPanion's Technical Support team. This address information will also be used as defaults when creating a new patron if no city, state, postal code, or country information is specified.

Site ID Code—This site code identifier is used to tag various record types including **Patrons** and **Items**. Other areas affected by the **Site ID Code** include **Orders**, **Budgets**, **Vendors**, **Subscriptions**, **Routes**, **Maps**, and **Bulletins**.

Site Name—Enter the name of your site (e.g. COMPanion Demonstration Library).

Administrator Title—The site administrator's title. For example, "Librarian", "Director of Media", "Library Specialist", or "Teacher"; this title can also be included on form letters.

Telephone—Provide the telephone number for the site's main desk or office.

Email—This is the site's email address, which is used as the return mail address for overdue notices and other email messages sent by Alexandria. To guarantee that your email notifications are being sent, please check the list of requirements located under your **Email** system preferences *(see page 151)*. You must enter a valid email address to use most email services, including COMPanion's Technical Support services.

Fax—If applicable, provide this site's fax number.

Researcher Notice—Any text you enter in this field will be displayed when you click on the **Site Information** link in your Researcher Workstation. Describe your library hours (e.g. *9:00 a.m. - 6:00 p.m. Monday through Friday*) with any combination of numbers and hours. If you decide to leave this field blank, the text "`Library Hours Not Specified`" will appear in the **Site Information** section of your Researcher Workstation *(see page 145)*.

Notes—Essentially, this tab acts as a notes field where you can provide any supplementary information about your managed sites.

Notes:

Introduction to Preferences

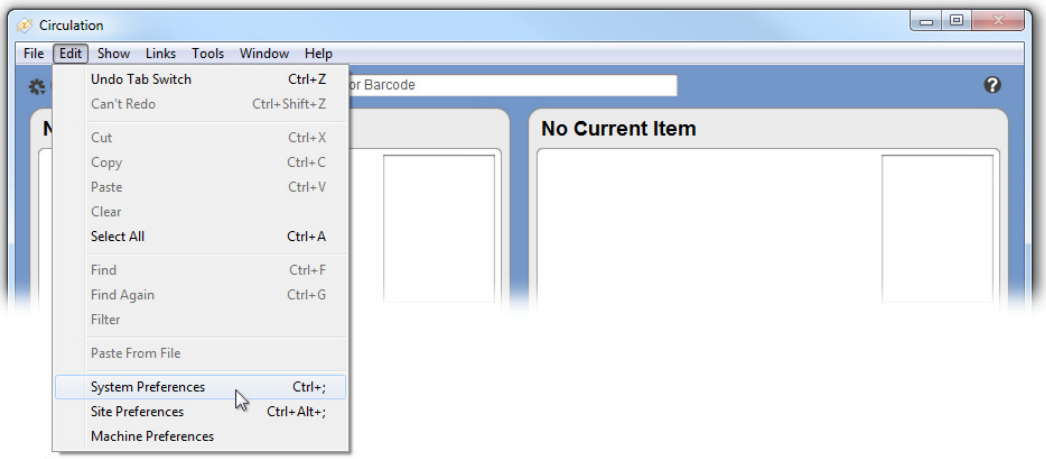
Alexandria may seem overwhelming at first, but as you experiment and explore, you will gradually grow more and more comfortable—especially once you've familiarized yourself with the standardized layout of management windows and the location of important preferences and frequently used features.

Although Alexandria is highly configurable and can be adapted to accommodate nearly every conceivable library environment, the scope of this *Getting Started Guide* is *not* to cover every possible procedure or preference option. Even if we provided exhaustive documentation for every single **System**, **Site**, or **Machine** preference—you would undoubtedly fall unconscious before you made it to the end.

Breaking down a behemoth such as Alexandria into manageable chunks can make the task seem much less monumental; therefore, the preferences detailed in this *Getting Started Guide* are broken down into bite-sized chapters that effortlessly usher you through the basics and help lighten the initial learning curve.

However, we realize that no two sites are the same and uncommon circumstances do exist where users with special needs require advanced features and targeted instructions in order to get set up properly.

For these individuals, we recommend going straight to Alexandria's **Online Help** *(www.companioncorp.com/mediawiki/index.php)* to review comprehensive documentation about our (**System**, **Site**, or **Machine**) preferences, various configurations, modules, expanded services, search add-ons, and clients; it thoroughly covers each and every one of them, including advanced techniques for unique and uncommon scenarios.



Alexandria has a variety of preferences that can be adjusted to make changes to the system and its behavior; the following chapters will cover some of the more essential ones required to get your software up and running.

- **System Preferences** are settings that are configured the same way for *every* client workstation connected to the your Data Station. If your permissions allow, changing **System Preferences** on a Librarian Workstation will also change them on the main (i.e. **Union**) Data Station.
- **Site Preferences** are a way of setting preferences for one specific site. For instance, in a **Central Union** environment, if you want English to be the default language for *all* sites, it makes sense to set this once (in **System Preferences**) instead of having to configure it at each and every site. However, if you wanted an individual site that you (or another operator) logs into to be set to a different language (e.g. Spanish), then you'll have to configure that site's **Site Preferences**. Afterward, when you log into that site, your **Site Preferences** (e.g. Spanish) are applied.
- **Machine Preferences** apply to a single computer. For example, only one of several library computers may have an attached slip printer; hence, **Slip Printer** preferences will appear in *that* workstation's **Machine Preferences** window.

Regardless if they're **System** or **Site**, preferences determine how your patrons use the library, how your items are managed, and how your library operates; they are used to customize Alexandria's circulation settings, default values for barcodes, settings for cataloguing, and restrictions for Researcher and Librarian Workstations.

You also use preferences to configure your library policies (i.e. the rules that dictate how your resources are used). You can set policies that determine how each item in your collection circulates and how certain patron groups are allowed to use your library. You can also configure policies that determine how long an item can be checked out, how long a hold request can be kept, etc.

To set up or change Alexandria preferences, you must first open either the **System Preferences** (Cmnd/Ctrl+;) or **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) window(s) using the **Edit** menu.

Alexandria's **System** and **Site Preferences** are organized together in an easy-to-use and easily-identifiable layout divided into the following categories: **Management**, **Circulation**, **Network Services**, **Search Add-Ons**, **System Administration**, and **Other**. Once either the **System** or **Site Preferences** window appears, click on the corresponding icon(s) to view the available preference settings.

Please keep in mind that certain preferences may not be available for certain clients. An Alexandria Data Station is usually configured to have more available preferences than a Librarian Workstation or a Web Librarian. Some preferences will only become active after you have licensed them (e.g. **Z39.50 Services**). If you have not licensed a particular feature, the corresponding icon will not appear in your preference windows.

Getting Started: Configuring System & Site Preferences

Although this is not a complete and comprehensive list of every preference tab in their entirety, the following provides a summary for each preference that COMPanion recommends you initially set and the order in which you should configure them after installation. Review the associated preference chapters for additional information on how to configure these settings for your site.

COMPanion recommends that you configure your **System Preferences** in the following order:

Site Management

1. **Site Management—**Although they're not found in either **System** or **Site Preferences**, know that it is *absolutely essential* to configure your sites before you set anything else—especially for those operating in a **Central Union** environment. In order for a copy or patron to exist in your database, they *must* belong to a site, therefore, an accurate **Site** record *must* exist.

System Administration

2. **Scheduled Events (Archives & Rebuilds)—**These preference are used to configure our software's built-in archiving functionality that saves copies of your data in a user-specified directory *(see "Scheduled Archives and Rebuilds" on page 63)*. We'll return to the **System** preferences again later in step 4—but configuring your **Scheduled Events** right out of the gate is both prudent and commonsensical.

3. **Security (System)—**These preference are used to create and manage access levels for operators. An operator's security level determines what actions they are allowed to perform and the areas of the program for which they have access *(see "Security Preferences" on page 69)*.

4. **System (System & Site)—**These preference are used to configure general information about your library and to adjust pre-determined scheduled events throughout the week *(see "System Preferences" on page 79)*.

5. **Address Book (System)—**These preference are used to configure address books for wide-area or multi-collection access *(see "Address Book Preferences" on page 85)*.

6. **Terminology (System)—**These preferences allow those who use Alexandria outside of the United States to have complete customization over their local vocabulary and currency standards *(see "Terminology Preferences" on page 97)*.

11. **Barcodes (System & Site)—**These preferences are used to configure how Alexandria should increment new patron and item barcode numbers *(see "Barcodes Preferences" on page 123)*.

Circulation

7 **Calendars (System)—**These preference are used to set up calendars for use at your site; calenders are used to schedule open days, closed days, period due dates and notes *(see "Calendar Preferences" on page 103)*.

8 **Policies (System)—**These preference are used to establish rules that regulate how library resources are used by your patrons; this includes how items circulate, how long items may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. Policies are an essential part of successful circulation, reports, and statistics *(see "Policy Preferences" on page 105)*.

13 **Rules (System & Site)—**These preference are used to configure information about patron lexiles, determine how often the transaction log is saved, create text for inclusion in the body of patron notices *(see "Rules Preferences" on page 133)*, etc.

Management

9 **Patrons (System & Site)—**These preference are used to configure information about library patrons, such as: default patron barcodes, default policy, and grade tables *(see "Patrons Preferences" on page 113)*.

10 **Items (System & Site)—**These preference are used to configure information about circulated items, such as: default item barcode ranges, barcode leaders, default policies, terminology, and catalogue settings *(see "Items Preferences" on page 119)*.

12 **Cataloging (System & Site)—**These preferences are used to configure general information about your subject sources, medium pictures, and leading articles *(see "Cataloging Preferences" on page 127).*

14 **Researcher (System & Site)—**These preference are used to define initial settings for your Researcher Workstations *(see "Researcher Preferences" on page 143)*.

Network Services

15 **Email (System)—**These preference are used to determines how Alexandria uses an external email service *(see "Email Preferences" on page 151)*.

Scheduled Archives and Rebuilds

Archiving Your Data

Setting automatic **Archives** in Alexandria is a two-fold process. You must configure settings in both your **System Preferences** (**Scheduled Events** tab) and your **Database Utilities**.

Alexandria has an archiving utility *(see "Archive Utility" on page 66)* that can be configured to make complete, regular copies of your valuable Alexandria **Data** and store them in a folder on your hard disk.

The major difference between a backup and an archive is that backups are made on removable media that can be physically stored away from the library. Archiving provides a quick and automatic method of saving your database before performing any large changes (e.g. importing, updates, utilities, or machine upgrades).

How Archiving Works

If the **Archives To Keep** drop-down menu (in the **Scheduled Events** tab of the **Site Information System Preferences** window) is set to anything below four (including zero), the **Archive First** (in the **Status** tab of the **Data Import** window) checkbox *(page 155)* and the **Archive Now** button *(page 66)* will keep five *manual* archives (as though the **Archives To Keep** preference was set to 5) and when a sixth *manual* archive is requested, Alexandria will first create a new data archive before removing the oldest archive in the **Current Archive Folder**.

In other words, every time you click the **Archive Now** button (in the **File** menu or **Scheduled Events** tab) or have the **Archive First** checkbox marked during import, Alexandria will perform a *manual* archive (even if your **Archives To Keep** is set to zero). However, if your **Archives To Keep** preference is set higher than 5, then the **Archive Now**[1] and **Archive First** selections will no longer ignore the **Archives To Keep** preference; in other words, *manual* archives will now be restricted to the specified **Archives To Keep** value.

Alexandria will perform an automatic archive based on the value specified in the **Archives To Keep** drop-down menu. Therefore, if your **Current Archive Folder** contains more archives than the **Archives To Keep** preference states, Alexandria will remove all of the surplus archives (oldest archives first) after it creates a new *automatic* archive.

For example, if you have the **Archives to Keep** preference set to `2` and Alexandria has already created two *automatic* archives in the **Current Archive Folder**, you will be able to add three additional *manual* archives to the folder, equalling five total archives.

If the **Archives to Keep** preference is set to `10` and Alexandria has already created four *automatic* archives in the **Application Support Archive** folder, you will be able to add six additional *manual* archives to the folder.

During an *automatic* archive, if the **Archives to Keep** preference is set to `2` but you have *manually* created three additional archives, Alexandria will create a new automatic archive before deleting the three oldest archives in the **Current Archive Folder** folder. This way, the number of remaining archives will match the value specified in the **Archives to Keep** preference (in this instance, two).

Use the **Refresh** button to update the dates and times for the **Next Scheduled Archive** and **Last Archive** in the **Scheduled Events** tab of the **Site Information System Preference** window.

Scheduled Events tab

Use the **Scheduled Events** tab to configure how many archives to keep and the location in which they are stored. The default keeps *five* backups inside your **Current Archive Folder**, which is typically located in your shared **Alexandria Support** folder. Clicking on the **Current Archive Folder** link will open the directory where all your archived data is stored.

Getting Started: Archiving

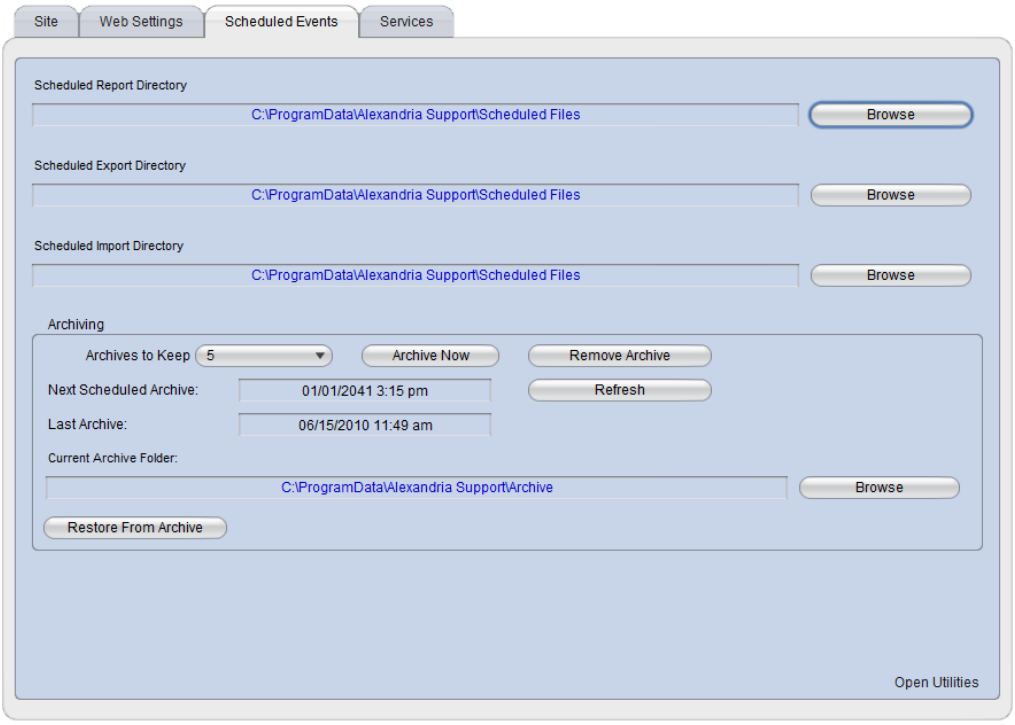
Step 1. Go to **Edit** on the main system menu bar and select **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **System** icon in the **System Administration** section of the **System Preferences** window.

Step 3. Set the **Archives to Keep** to **5** (suggested).

Step 4. Change your **Current Archive Folder** if necessary (not suggested).

Step 5. Click on **Save** in the upper-right corner of the window.

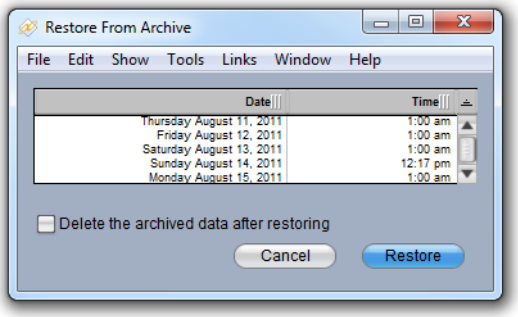


- NOTE-

If you have multiple Data Stations, setting your **Scheduled Events** preferences will have to be done for all of your schools by a District operator that has the rights to Alexandria Controller and/or Central Union.

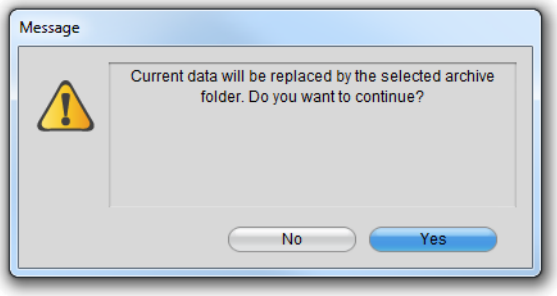
Restore From Archive

If you would like to restore your data from a previously created archive, click on the **Restore From Archive** button. The **Restore From Archive** window will appear.


Restore From Archive
File Edit Show Tools Links Window Help
Date
Time
Thursday August 11, 2011 1:00 am
Friday August 12, 2011 1:00 am
Saturday August 13, 2011 1:00 am
Sunday August 14, 2011 12:17 pm
Monday August 15, 2011 1:00 am
Delete the archived data after restoring
Cancel
Restore

Select (highlight) the archive that you'd like to restore from; data archives are listed in oldest-to-newest order.

Once you have selected the correct archive to restore, click the **Restore** button. Your current data will be replaced by the selected archive folder. A warning window will appear, asking if you're positive that you would like to continue. Click **Yes** to continue or **No** to cancel.



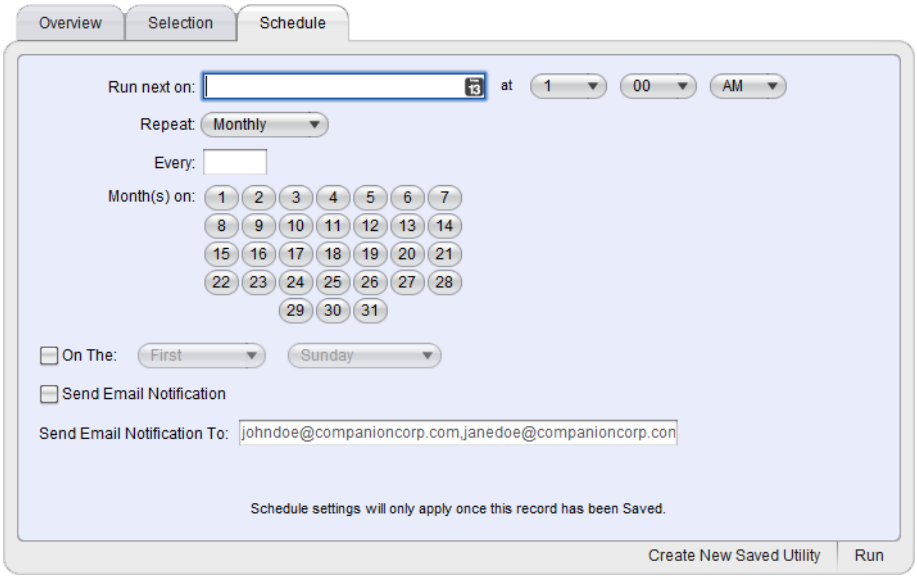
You may also check the **Delete the archived data after restoring** box if you would like to remove the selected archive from your archive folder upon successful restoration.

NOTE:
Archives are not a backup! Keeping an offsite backup is highly recommended.

Archives come in handy when trying to fix a bad import, but are entirely useless in the event of a system crash.

Archive Utility

The **Archive Utility** allows you to schedule automatic backup copies of your valuable Alexandria Data.



When it's time for an archive, all information in the **Data** folder is copied the **Current Archive Folder** specified in the **Scheduled Events** tab *(see page 68)*. During archiving, all library services on the Data Station are disabled and if any clients are connected, the **Remote Control** window will appear.

You should *never* disable the automatic archiving function. Your most recent archives are invaluable in securing the safety of your library data.

- NOTE -

The Data Station must be turned on and running when you have the archive scheduled to take place. Thus, if the administrator doesn't want to leave their computers running overnight, they should change the default time(s) that the program is set to archive.

Send Email Notification—Alexandria has the ability to send email notification to users when a scheduled archive has completed it's work. Supply the appropriate email addressees in the field below to enable email notification.

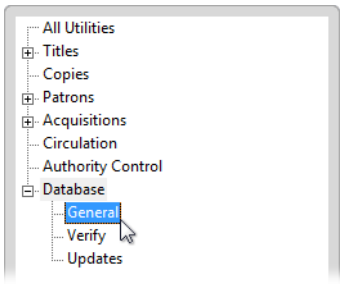
Send Email Notification To—Enter the email addresses of those who should be informed when an archive operation finishes. Multiple addresses should be separated by commas.

Getting Started: Scheduling Archives

Step 1. Select **Tools** from the system menu bar, followed by **Utilities**.

Step 2. Click on the **Database** category from the utility **Categories** pane on the right-hand side of the window.

Step 3. Click the **General** subcategory.



Step 4. Next, select (highlight) **Database Archive** from the **Saved** tab.

Step 5. On the **Schedule** tab of the **Database Archive** utility, enter a date into the **Run next on** field.

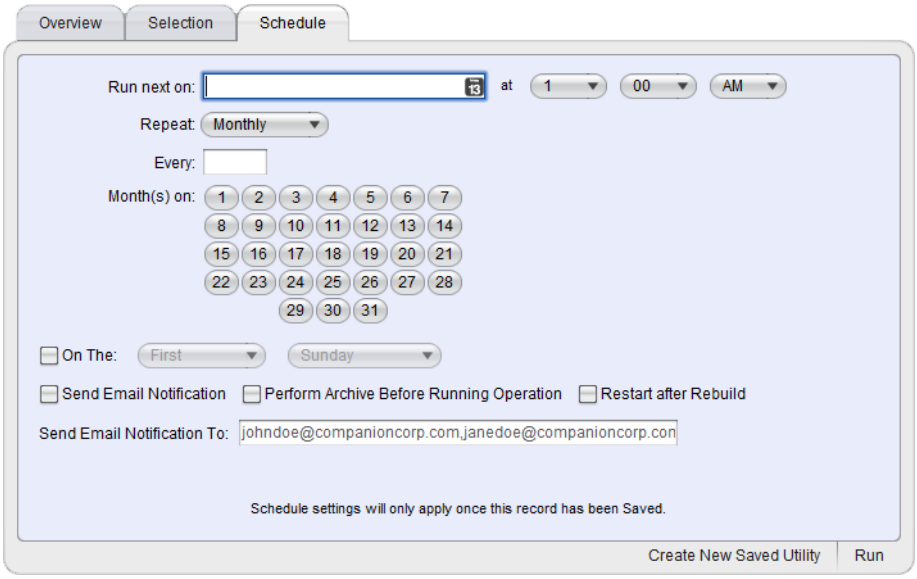
Step 6. Select how often to repeat the archive using the **Repeat** drop-down menu. You can choose **Never**, **Daily**, **Weekly**, **Monthly**, or **Yearly**. Click on desired days, weeks, months, or years so that they appear selected or use the **On The** checkbox and corresponding drop-down menus.

Step 7. Set the **Hours** (**11 00 PM** is suggested) to whatever time you would like to run the archive. It should be done late at night when people are not normally accessing your catalog; this way, it doesn't appear that your catalog is frozen—Alexandria cannot perform searches or circulation activities during an **Archive**.

Step 8. Click **Save All** in the upper-right corner of the window.

Rebuild Utility

The **Rebuild Utility** allows you to perform or schedule automatic rebuilds of your Alexandria database.



Send Email Notification—Alexandria has the ability to send email notification to users when a scheduled rebuild has completed it's work. Supply the appropriate email addressees in the field below to enable email notification.

Send Email Notification To—Enter the email addresses of those who should be informed when a rebuild operation finishes. Multiple addresses should be separated by commas.

Getting Started: Rebuilding Your Hosted Database

Step 1. Select **Tools** from the system menu bar, followed by **Utilities**.

Step 2. Click on the **Database** category from the utility **Categories** pane on the right-hand side of the window.

Step 3. Click the **General** subcategory.

Step 4. Next, select (highlight) **Database Rebuild** from the **Saved** tab.

Step 5. On the **Schedule** tab of the **Database Rebuild** utility, enter a date into the **Run next on** field.

Step 6. Select how often to repeat the rebuild using the **Repeat** drop-down menu. You can choose **Never**, **Daily**, **Weekly**, **Monthly**, or **Yearly**. Click each of the desired days, weeks, months, or years so that they appear selected or use the **On The** checkbox and corresponding drop-down menus.

Step 7. Set the **Hours** (**11 30 PM** is suggested) to whatever time you would like to run the rebuild. It should be done late at night when people are not normally accessing your catalog; this way, it doesn't appear that your catalog is frozen—Alexandria cannot perform searches or circulation activities during an **Rebuild**.

Step 8. Click **Save All** in the upper-right corner of the window.

Security Preferences

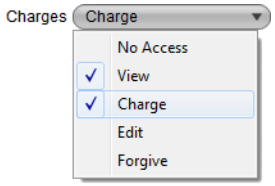
The **Security System Preferences** window allows an administrator to modify existing or create custom **Security Groups**. In turn, these **Security Groups** (assigned to individuals using the **Patrons** management window; see page 259) determine what actions operators or patrons are permitted to perform.

Alexandria comes standard with several default **Security Groups**; from **District Administrator** to **Self-Service** security groups. **District Administrator** is the least restrictive and allows unlimited access to Alexandria preferences and settings. **Student Aide** is the most restrictive security group, only allowing users to search the database.

When a new patron is added to the system, their default **Security Group** will be **Patron**. However, you may need to change that **Security Group** to one that grants more appropriate permissions.

Operators (with the appropriate authority) are able to create their own custom security groups by manipulating lists of permissions organized by tab; these tabs include **Management**, **Circulation and Preferences**, **Reporting**, and **Researcher**. By default, **Administrator**-level access is the only security group that allows you to do this.

When a particular permission is selected, operators assigned that **Security Group** will be able to perform all the functions listed *above* that selected permission. For example, if **Charge** is selected, the operator may both **View** and **Charge** fines. If **Forgive** had been selected, the operator would have been able to **View**, **Charge**, **Edit**, and **Forgive** charges.



Alexandria will launch with full administrative privileges if your security is *off* by default; this happens when the **Password** for **System Administrator Special Operator** (barcode 10) matches your Alexandria Serial Number *(see Activating Security on page 73 for more information)*.

If your security is enabled, you may select **Restart** or **Log Out** from the **File** menu to access Alexandria as an operator with a different security group.

Default Security Groups

Below are the default security groups available in Alexandria. Each of these default security groups *can* be edited; however, they can *not* be deleted or renamed.

District Administrator—Full access to every control and setting within Alexandria, including the ability to examine and change registered operators. Operators at this level can edit district level preferences and have access to *all* library preferences. All other access levels can only modify records from their assigned library collections. The **District Administrator** security group can *not* be removed or modified.

Library Administrator—Full access to every control and setting within Alexandria, including the ability to examine and change registered operators. Operators with this security level can only edit preferences for their assigned collection.

Librarian—Full access to every control and setting within Alexandria except the ability to examine registered operators and **Address Books**.

Library Staff—Access to all system functions and reports except **System Preferences**, **Imports** and **Utilities**.

Library Aide—Access to Alexandria Librarian capabilities and standard circulation commands, with the authority to allow restricted actions. For example, if a patron has too many books issued, a warning message appears when the patron tries to check out another book. With this security group, the library aide can override the message and allow the patron to check out another book.

Student Aide—Access to Alexandria Librarian capabilities and standard circulation commands, but no authority to allow restricted actions. See the description of **Library Aide** (listed above) for an example of a restricted action.

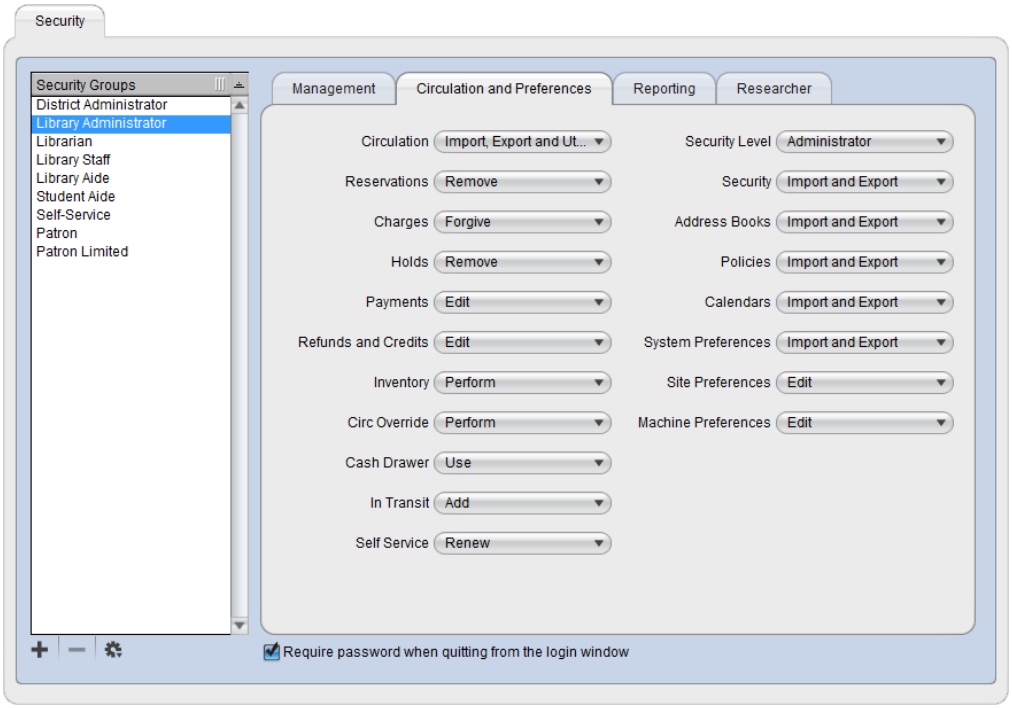
Self-Service—Supports **Student Aide** privileges with the addition of **Check In** and **Bookdrop** circulation commands and the bookdrop capability. The **Circulation** window is allowed for **Bookdrop** mode only *(see "Bookdrop Mode (B)" on page 227)*. At this security level, overdue fines are automatically recorded with no opportunity to accept payment, or forgive/adjust fines. Fines are still displayed in the transaction log.

Patron—This is the default security group for all newly created patrons. It can *not* be deleted. The only settings that can be modified in this security group are on the **Researcher** tab.

Patron Limited—For convenience, this patron-level security group is essentially the same as the **Patron** level, but you are allowed to modify the **Management**, **Circulation and Preferences**, and **Reporting** tabs along with the **Researcher** tab.

Security tab

The left pane of the **Security** tab lists the default **Security Groups** that can be established and assigned. On the right side of the window, permissions that belong to each security group are listed in a series of drop-down menus under four distinct tabs: **Management**, **Circulation and Preferences**, **Reporting**, and **Researcher**.



Management—The permissions contained in this subtab define how operators are allowed to access and interact with Alexandria's management windows; these include **Patrons**, **Items**, **Advanced Bookings**, **Sites**, **Authority Control**, and acquisitions—just to name a few.

Circulation and Preferences—The permissions contained in this subtab dictate whether operators are allowed to access and edit **System**, **Site**, and **Machines Preferences**; also: charges, refunds, payments, reservations, holds, and inventory services.

Reporting—The permissions contained in this subtab govern what report types operators are allowed to view, add, edit, or remove.

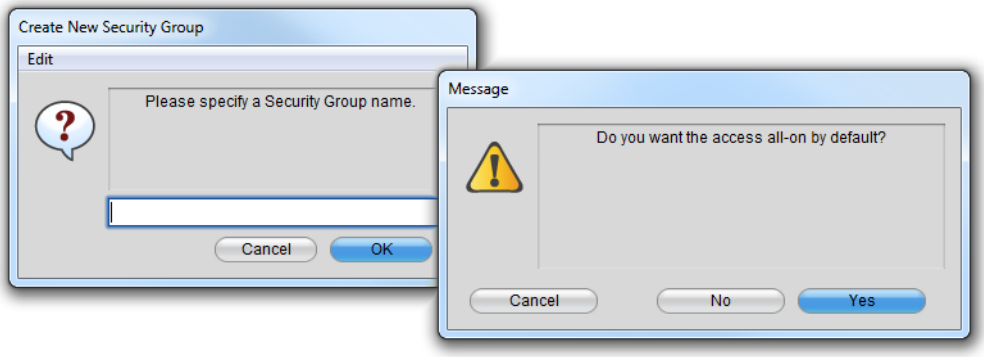
Researcher—The permissions contained in this subtab relate directly to how operators and patrons are allowed to interact with your Researcher Workstations *(see page 145)*.

NOTE:
By default, only the **District** and **Library Administrator** can add custom or edit existing security groups.

Security Settings

Operators with the appropriate authority can add, duplicate, edit, or remove any of Alexandria's security groups with the exception of the default security groups, which *can* be edited, but *not* removed or renamed.

These windows, which allow operators to create their own custom security groups, can be accessed by clicking on the **Add** ("**+**") button located on the lower-left corner of the **Security** preference window.



If you would like to create a new security group based on an existing security group and its list of enabled and disabled security options, select (highlight) the security group that you would like to have duplicated from the **Security Group** field, and select **Duplicate** (Cmnd/Ctrl+D) from the **Actions** menu.

You may also choose to create a new security group that isn't based on any that currently exist in your system. In this instance, some operators will find it easier to have all of their security options enabled or disabled when creating a new security group from scratch. Choose **Yes** to have all access turned on or **No** to have all access turned off.

After you have successfully created/duplicated a new security group, it will appear in the **Security Groups** field of the **Security System Preferences** window.

From this point on, you may treat the newly created/duplicated security group as you would any existing security group; it may be edited, renamed, or it may be completely removed from the system.

Add—This button ("**+**"), located in the lower-left corner of the tab, opens the **Create New Security Group** window.

Remove—Operators with the appropriate authority can remove an operator-created security group by highlighting (selecting) the level from the **Security Groups** section of the **Security System Preference** window and clicking the **Remove** button (the "**—**" icon). Operators will be asked if they are sure they would like to remove the selected security group; click **OK** to proceed or **Cancel** to abort the removal. Operators will *not* be able to remove any of Alexandria's default security groups.

Actions—This menu, located on the lower-left corner of the **Security System Preference** window, allows you to **Rename**, **Remove**, **Duplicate**, **Export**, **Import**, or **Print** any of the selected (highlighted) security groups.

Require Password When Quitting From the Log In Window—If this box is checked, operators aren't allowed to **Quit from the Log In** window unless they provide an acceptable **Password**.

Logging In and Activating Security

There is no "require operators to log in" checkbox that magically turns security on or off for Alexandria. Rather, security is controlled by the **System Administrator Special Operator** (barcode 10)[1]. The **System Administrator Special Operator** (barcode 10) can *not* be removed and its **Security Group** can *not* be changed from the **District Administrator** setting. Otherwise, however, the **Special Operator** can be modified just like any other **System Patron**.

Security is *off* when the **Password** for **System Administrator Special Operator** (barcode 10) matches your Alexandria **Serial Number**. When security is turned *off*, the **Log In** window does *not* appear and *any* operator who attempts to launch the program will be automatically logged in.

In order to enable security (which we *strongly* recommend), you *must* use the **Reset Password** button to change the default password for this special **District**-level operator to something other than the application **Serial Number**. COMPanion suggests using a strong, secure password by mixing different types of characters; use some uppercase letters along with lowercase letters, numbers and even special characters such as *"&"* or *"%"*.

When security is turned *on*, access to our software requires that a **User ID** and **Password**[2] be entered into the **Alexandria Log In** window every time the program is launched[3].

If the **Require Password When Quitting From the Log In Window** box is checked in your **Security System Preferences**, operators aren't allowed to **Quit** from the **Log In** window unless they provide an acceptable **User ID** and **Password**.

If security *is* enabled and you would like to immediately access the **Log In** window (or log into our software as a different operator), choose **Restart** (Ctrl+Alt+Shift+E) (Option+Cmnd+E) or **Log Out** (Cmnd/Ctrl+E) from the **File** menu.

When the **Alexandria Log In** (or **Permission Override**[4]) window appears, enter the appropriate **User ID** and **Password** and click **Log In** to access the software.

The **User ID** and **Password** that you enter during **Log In** will be recorded to the **Transaction log** as well as all failed login attempts.

1.We give you the opportunity to enable/disable security by setting the **Password** for the **System Administrator Special Operator** *(bar-code 10)*. The default is your application **Serial Number** which you can change (or not change) as you see fit.
2.If a **User ID** or **Password** was not supplied in the **Personal Info** tab during the creation of a new patron/operator, their **Barcode** will be used as the **User ID** and their **Last Name** will be used as the **Password** by default.
3.The very first time that Alexandria is launched, you should create an **Administrator**-level operator that may later be edited, but never removed.
4.If you are restricted to Aide-type security privileges, attempting to **Log Out** or **Restart** from the **File** menu will open the **Permission Override** window. For more information about **Permission Override** and how it's used, please review the **Permission Override** section of *Alexandria's Online Help*.

NOTE:
User ID and **Passwords** are *not* case sensitive!

Accessing Alexandria as a Different Operator

There are times when you will need to access Alexandria as an operator other than the one who is currently logged into the program; especially if you are required to perform a specific task that the current operator does not have the security permissions to accomplish.

For example, on a Librarian Workstation that is currently being used by a **Student Aide**, you may need to log in as the **District/Library Administrator** to change a preference—a task for which the default **Student Aide** does *not* have authorization.

There is currently only one way to access Alexandria as a different operator:

- **Restart** (Ctrl+Alt+Shift+E) (Option+Cmnd+E) or **Log Out** (Cmnd/Ctrl+E)[1] from the **File** menu. When the **Alexandria Log In** window appears, enter the appropriate **User ID** and optional **Password** and click **Log In** to access the software as an entirely new operator.

If the operator who is currently logged into the program doesn't have the security permissions to access or change specific options, information, or preference tabs, you may temporarily override and expand their security limitations (for a set duration) using the **Permission Override** window.

1.Some security groups require the proper security permissions to perform a **Restart**.

Step-by-Step: Creating A New Security Group

This window, which allows operators to create their own custom security groups, can be accessed by clicking on the **Add** ("**+**") button located on the lower-left corner of the **Security** preference window.

To create a new security group:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Security** icon in the **System Administration** section of the **System Preference** window.

Step 3. Once in the **Security** preference, click on the **Security** tab.

Step 4. Click on the "**+**" icon located on the bottom-left of the **Security** tab. The **Create New Security Group** window will appear.

Step 5. Enter the name for your new security group (e.g. **Parent Aide**).

Step 6. Next, determine whether you want all security access on or off by default; some operators will find it easier to have all of their security options enabled or disabled when creating a new security group from scratch. Choose **Yes** to have all access turned on or **No** to have all access turned off.

Step 7. After you have successfully created your new security group, it will appear in the **Security Groups** field of the **Security System Preference** window. From this point on, you may treat the newly created security group as you would any existing security group; it may be edited, renamed, or it may be completely removed from the system.

Step 8. If you like, you may now further customize your new security group and edit individual security privileges. Use the **Management**, **Circulation and Preferences**, **Reporting**, and **Researcher** tabs that cross the top of the security group, in addition to the drop-down menus, to either grant or restrict security privileges.

Step 9. When you are done making changes, click on **Save** to keep your changes or **Revert** to cancel.

NOTE:
If you would like more information on a specific security permission, you can examine their **Tool Tips** by holding down the <Ctrl> (Windows) or <Option> (Macintosh) key and moving over the permission names.

Step-by-Step: Duplicating A Security Group

If you would like to create a new security group based on an existing security group and its list of enabled and disabled security options, select (highlight) the security group that you would like to have duplicated from the **Security Group** field, and select **Duplicate** (Cmnd/Ctrl+D) from the **Actions** menu.

To duplicate an existing security group:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Security** icon in the **System Administration** section of the **System Preference** window.

Step 3. Once in the **Security** preference, click on the **Security** tab.

Step 4. From the **Security Groups** section, select (highlight) the security group from which you would like to duplicate the privileges for your new security group.

Step 5. Next, select **Duplicate** (Cmnd/Ctrl+D) from the **Actions** drop-down menu located at the bottom-left of the **Security** tab. The **Duplicate Security Group** window will appear.

Step 6. Enter the name for your new security group (e.g. **Volunteer Aide**).

Step 7. After you have successfully duplicated an existing security group, it will appear in the **Security Groups** field of the **Security System Preference** window. From this point on, you may treat the newly duplicated security group as you would any existing security group; it may be edited, renamed, or it may be completely removed from the system.

Step 8. If you like, you may now further customize your duplicate security group and edit individual security privileges. Use the **Management**, **Circulation and Preferences**, **Reporting**, and **Researcher** tabs that cross the top of the security group, in addition to the drop-down menus, to either grant or restrict security privileges.

Step 9. When you are done making changes, click on **Save** to keep your changes or **Revert** to cancel.

Step-by-Step: Editing A Security Group

The ability to edit an existing (custom or default) security group can be accessed by selecting (highlighting) one of the **Security Groups** on the **Security** preference window and then toggling[1] any of the drop-down menus located in the **Security** tabs (**Management**, **Circulation and Preferences**, **Reporting**, and **Researcher**). You can use these drop-down menus as a reference to see how other security groups operate or to quickly change a specific permission on several different security groups.

You may edit the name of the current security group by selecting **Rename** from the **Actions** menu. Doing so will open the **Query** window. Input the new security group name and click **OK** when you are satisfied with your changes. Operators will be unable to change the names of Alexandria's default security groups and each security group name *must* be unique.

To edit an existing security group:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Security** icon in the **System Administration** section of the **System Preference** window.

Step 3. From the **Security Groups** section, select (highlight) the security group whose privileges you would like to edit.

Step 4. Make the desired changes (either grant or restrict security privileges) using the drop-down menus contained in the **Management**, **Circulation and Preferences**, **Reporting**, and **Researcher** tabs that cross the top of the security group.

Step 5. You may edit the name of the current security group by selecting **Rename** from the **Actions** menu.

Step 6. When you are done making changes, click on **Save** to keep your changes or **Revert** to cancel.

1.In technical terms, toggle means "to alternate between two or more electronic, mechanical, or computer-related options, usually by the operation of a single switch, drop-down menu, or keystroke (e.g. *toggled back and forth between two windows on the screen*)."

Step-by-Step: Removing A Security Group

You may remove the currently selected (highlighted) security group by clicking on the **Remove** button. Operators will be asked if they are sure they would like to remove the selected security group; click **OK** to proceed or **Cancel** to abort. Operators will *not* be able to remove any of Alexandria's default security groups. Once a security group has been deleted, it can not be restored.

Alexandria security permissions are categorized and compartmentalized into groups of similar permissions (e.g. **Preferences**, **Data**, **Circulation**, **Utilities**, etc.). You may toggle between these categories of permissions using the **Management**, **Circulation and Preferences**, and **Reporting** tabs provided in the **Security** window.

Each tab refers to a particular set of permissions. For example, the **Management** tab contains security permissions that pertain to items, item copies, patrons, orders, budgets, vendors, subscriptions, and routes.

By using the drop-down menus contained within these tabs, you can enable or disable specific security permissions for the existing security group. For example, if you are creating a custom security group that would enable operators to import orders, then select **Import, Export, and Utilities** from the **Circulation** drop-down menu in the **Circulation and Preferences** tab.

When you have finished editing all of your security permissions, click **Save** to keep your changes or **Revert** to discard them. You will be required to **Save** or **Revert** before toggling between any other security groups or leaving the **Security** window.

To remove an existing security group:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Security** icon in the **System Administration** section of the **System Preference** window.

Step 3. From the **Security Groups** section, select (highlight) the security group whose privileges you would like to remove.

Step 4. Click the **Remove** button.

Step 5. Operators will be asked if they are sure they would like to remove the selected security group; click **Yes** to proceed or **No** / **Cancel** to abort the removal. Operators will not be able to remove any of Alexandria's default security groups.

Step 6. When you are done making changes, click on **Save** to keep your changes or **Revert** to cancel.

System Preferences

Step-by-Step: Setting System Preferences

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **System** icon in the **System Administration** section of the **System Preferences** window.

Step 3. In the **Site** tab, indicate the default language to be used by the program.

Step 4. Next, in the **Web Settings** tab, peruse the contents of the **Web Options** and **Web Settings** subtabs; configure any preference options that you understand if it makes sense for you to do so. We recommend setting your **Librarian Timeout** and check (or uncheck) the option to **Display [web] log messages** in the **Transaction Log** of the Data Station.

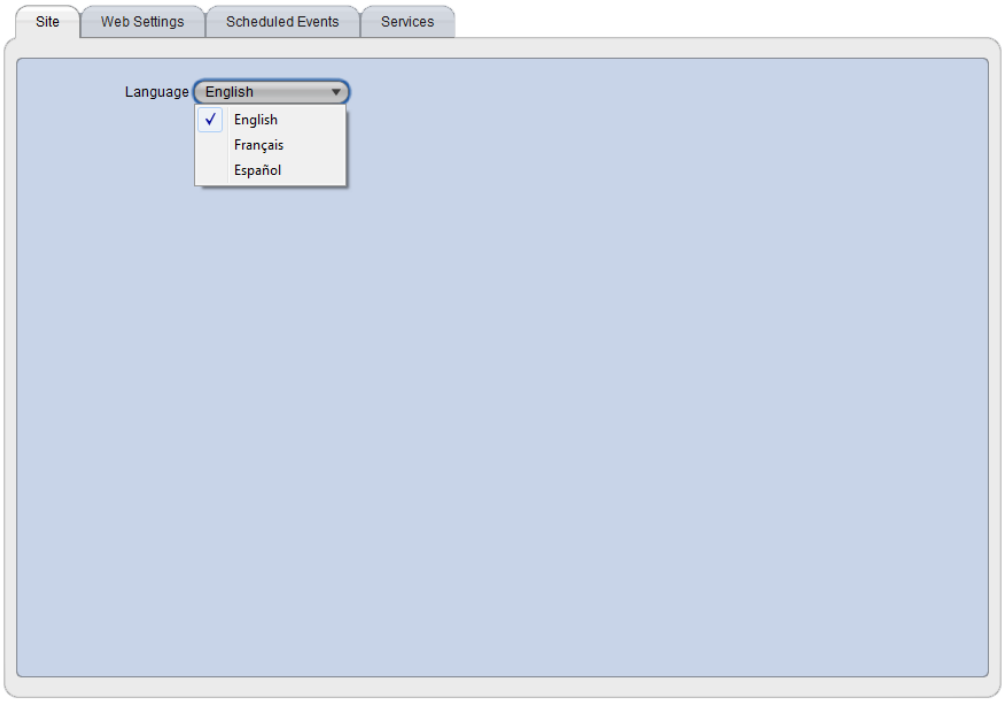
Step 5. You should have already configured your **Scheduled Events** tab following the guidelines set forth in a previous chapter *(see page 63)*; if not—do so now.

Step 6. If you are *absolutely sure* you want Alexandria to run as a service, configure the appropriate options in the **Services** tab. If you don't know what it means to run Alexandria as a service, please *do not* select this option!

Step 7. After you have properly configured your **System** preferences, click on **Save** in the upper-right corner of the window.

Site tab

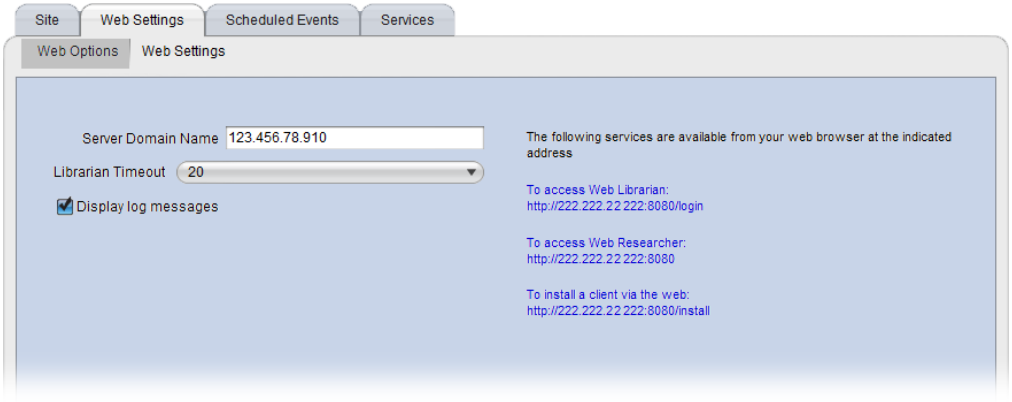
Select the default language that Alexandria will use from the list of available languages. Default is **English** unless otherwise set by activation codes[1]. Currently, Alexandria only supports the **English**, **French**, and **Spanish** language.



1.The default language preference is initially set by your Alexandria registration information.

Web Settings tab: Options subtab

If you use Web Librarian and Researcher Workstation for your operators and patrons, these preferences are available to help setup your library's web services. Eventually, you will also have to set your **Researcher System Preferences** *(see "Researcher Preferences" on page 143).*



Server Domain Name—This is the domain name that clients should use to connect to the server if a domain name is preferred over a plain IP address. This is the address that will be used to help clients find the servers after a web install.

Librarian Timeout—This drop-down menu allows you to set how many minutes an individual Librarian Workstation can remain idle before logging out the current operator. Default is **20**.

Display Log Messages—This option will *display* all remote commands (i.e. commands issued from a Web Librarian or Librarian Workstation) in the **Circulation** window of your main Data Station's **Transaction Log**—just as commands that are typed into the command line of the main Data Station are logged. If this option is unchecked, issued commands will be archived to the local log file *only*.

Quick Links

If licensed, these services will be available in a web browser using the indicated `http://` addresses. Alternately, you can click on the addresses themselves—they act as hyperlinks—taking you immediately to the indicated address using your system's default web browser.

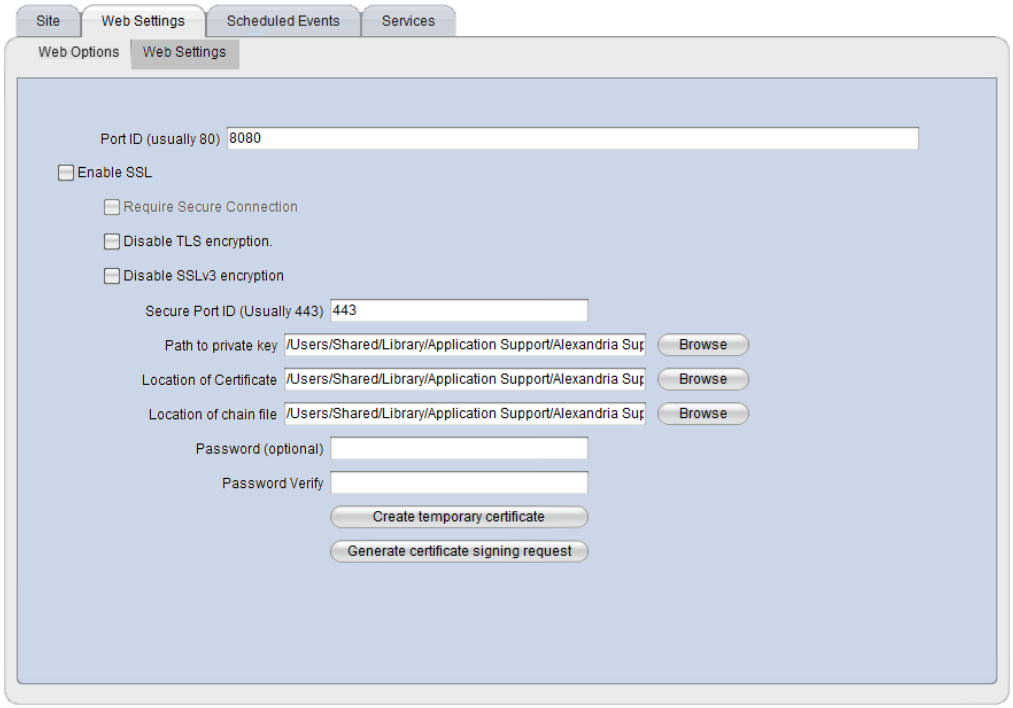
To access Web Librarian—Click this quick link to launch the Web Librarian client in your default web browser *(for more information, please review the "Web Librarian" section of Alexandria's Online Help)*.

To access Researcher Workstation—Click this quick link to launch the Researcher Workstation in your default web browser *(for more information, please review the "Researcher Workstation" section of Alexandria's Online Help)*.

To install a client via the web—Click this quick link to launch the **Alexandria Web Installer** in your default web browser *(see page 33 for more information)*. This address is what you should use on all of the machines for which you would like to install an Alexandria Librarian Workstation.

Web Settings tab: Web Settings subtab

Alexandria's web services support secure web communications. When SSL (Secure Sockets Layer) communications are enabled, then the web service will only accept communications from the secure web port.



Web Settings

Port ID (usually 80)—Sets the port number used for the web interface (this is usually 80).

Enable SSL

Our software supports secure web communications. When SSL (**S**ecure **S**ockets **L**ayer) communications are enabled, then our software will *only* accept communications from the secure web port.

Enable SSL—Enable a secure web connection.

Require Secure Connection—Disable the non-secure web service.

Disable TLS encryption—This is not recommended unless necessary.

Disable SSLv3 encryption—This is not recommended unless necessary.

Secure Port ID (Usually 443)—Enter the port number used for the secure web interface. The default is 443.

Path to Private Key—This is the file name and location of the Data Station's private key. The file name and location may be entered or changed manually on a connected Web or Librarian Workstation, but it *must* follow the correct file specifications. If you are on a Data Station, you are able to click a **Browse** button to navigate to the local private key location. Only certificates in PEM format are recognized.

Location of Certificate—This is the file name and location of the Data Station's public certificate. The file name and location may be entered or changed manually on a connected Web or Librarian Workstation, but it *must* follow the correct file specifications[1]. If you are on a Data Station, you are able to click a **Browse** button to navigate to the local public certificate location. Only certificates in PEM format are recognized.

Location of Chain File (optional)—This is the file name and location of the Data Station's chain file. The file name and location may be entered or changed manually on a connected Web or Librarian Workstation, but it *must* follow the correct file specifications. If you are on a Data Station, you are able to click a **Browse** button to navigate to the local public certificate location. Only certificates in PEM format are recognized.

Password (optional)—If the private key requires a password, enter it in this field.

Password Verify—Verify the private key password.

Create temporary certificate—If clicked, then a private key and public certificate will be created and saved in the default location (described above). They will be created with help from Alexandria and/or Textbook Tracker's registration information and expire in 365 days.

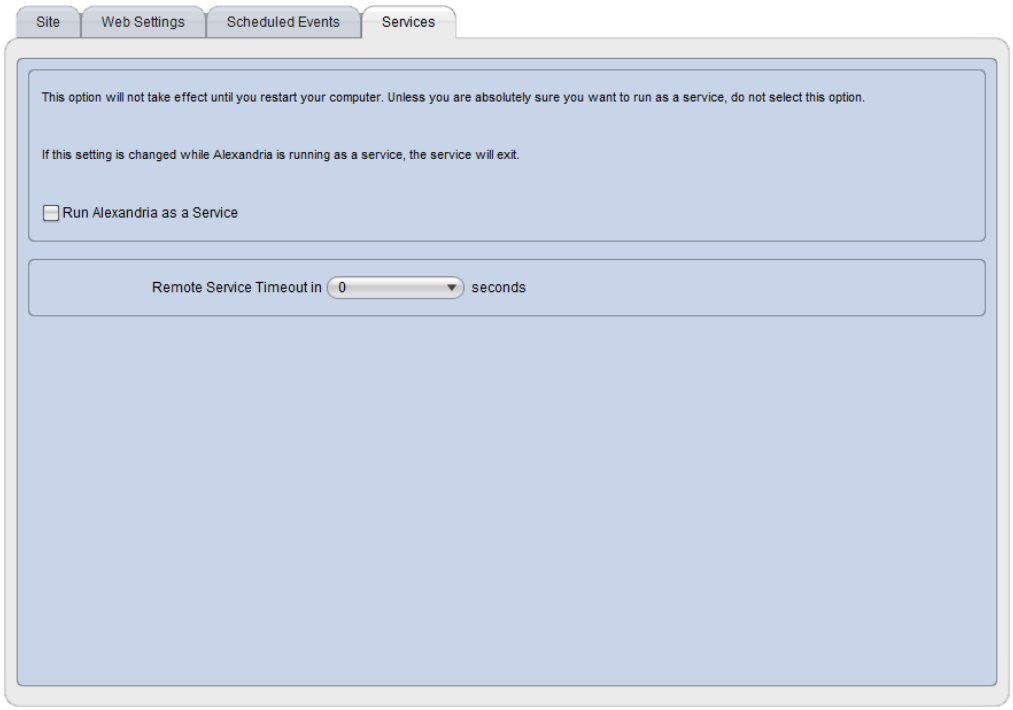
Generate certificate signing request—If clicked, then a request for a certificate will be created. This request can be sent to a certificate authority.

- NOTE -

The **PEM** format (**P**rivacy **E**nhanced **M**ail), an early standard for securing electronic email; the PEM format is not widely adopted as an internet mail standard.

Services tab

This ability to **Run Alexandria as a Service** automatically launches Alexandria and runs it in the background every time your computer is started. Operators will be unable to access program menus or make changes to patrons or items while Alexandria is running as a service. You will need to deactivate the service and then re-launch Alexandria in order to access your library data. Running Alexandria as a service does not take effect until you restart your computer. Unless you are *absolutely sure* you want Alexandria to run as a service, *do not* select this option.

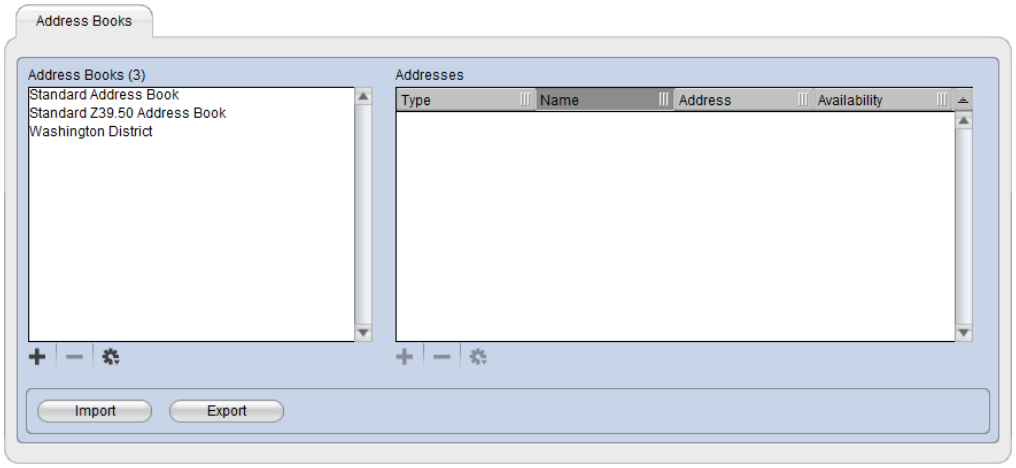

Site
Web Settings
Scheduled Events
Services
This option will not take effect until you restart your computer. Unless you are absolutely sure you want to run as a service, do not select this option.
If this setting is changed while Alexandria is running as a service, the service will exit.
Run Alexandria as a Service
Remote Service Timeout in
0
seconds

Address Book Preferences

- NOTE -
Both Alexandria WAN access and Z39.50 capabilities are optional features of Alexandria. You must purchase separate licenses to use these features. If you have not purchased these options, WAN and Z39.50 capabilities will *not* be active in your system.

Getting Started With Address Books

Address Books allow your Librarian and Researcher Workstations to communicate with other Alexandria Data Stations in your district. With the optional Z39.50 or wide area network (**WAN**) feature of Alexandria, you are granted access to these interconnected library collections. If the only library collection you require access to is the one stored on your main Data Station or you don't have a **WAN** or a **Central Union** license, you won't need to set up any address books—your defaults will already be set to the appropriate configuration.



Every Data Station has an address book called the **Standard Address Book**. This **Address Book** contains all the items and assets that are inventoried in your collection. You *may not* edit, move, or remove the **Standard Address Book**; however, you can edit, move, or remove the addresses contained within. You may add as many address books as you need to manage your Alexandria libraries and/or collections.

Generally, most operators will save individual address entries for each of their extraneous sites in the **Standard Address Book**. However, additional address books *may* be used for more extensive searches. For example, you can create custom address books that contain sites for geographical regions (e.g. Northwest Quadrant) or levels (i.e. Elementary Schools) in a school district. These additional **Address Books** can then be entered into the **Standard Address Book** to create **Submenus** and **Search Groups** (as shown with **Washington District** in the example screenshot below).

In a Central Union environment, as you add sites using the **Sites** management window *(see page 51)*, addresses—including associated **Site ID Codes**—are automatically added to your **Standard Address Book**. These addresses can be moved, removed, and edited. In most cases, you won't ever need to worry about adding **Sites**; someone from your district's information technology (IT) department will usually set this up for your entire system.

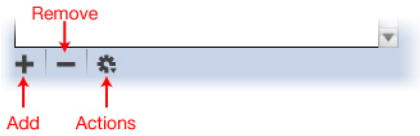
Using **Researcher System Preferences** *(see page 143)*, you can select the default **Address Book** (i.e. **Search Address Book**) to be searched by every Researcher Workstations that connects to your Data Station. Furthermore, each Researcher Workstation that connects to your Data Station can be individually customized (using the **Config** button) to search a specified address book.

On a Researcher Workstation, your **Local Collection** (i.e. the addresses contained in the **Standard Address Book**) will always be shown at the top of the **Library Search** list, followed by groups and individual entries (listed alphabetically).

If you don't want an **Address Book** to appear in this list, select **Hide on Researcher** or **Hide Everywhere** from the **Availability** drop-down menu (when you **Add** or **Edit** a **Site Address**); *page 92*.

Address Books Settings

The area situated below the **Address Books** and **Addresses** list field contains several tools icons that are used for adding, duplicating, editing, removing, pinging, and moving address books and site addresses.



Add—Clicking on the **Add** button will perform either the **Add Book** / **Add Site Address** function. If the <Alt> / <Option>-key is depressed when clicking one of these buttons, it will perform the **Duplicate** command.

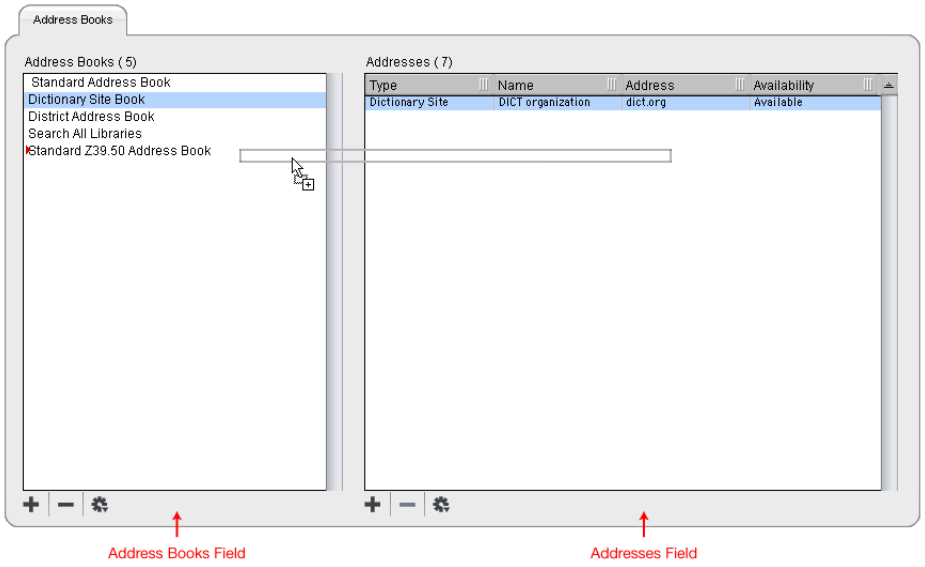
Remove—Clicking on the **Remove** button will perform either the **Remove Book** / **Remove Site Address** function.

Actions—This gear/cog icon contains address book / site address-specific actions and other tools, including the **Ping** selection which tests the availability of the selected database.

Adding, Duplicating, Editing, and Removing Address Books

You may add as many different address books as you need to manage your library collections. Since you can specify which address books your Researcher Workstation will use by default, additional address books can be used for more extensive searches. Click on the **New** ("**+**") button under the **Address Books** field to add a new address book. Your Data Station's local library collection is represented as the **Standard Address Book**.

Address books may contain other address books; you can copy (add) an existing address type (e.g. **Alexandria Data Station**, **Textbook Tracker Data Station**, **Dictionary Site**, **Z39.50 Site**, **Embedded Book**) to an existing address book by dragging an address line from the **Addresses**[1] field onto/into one of the address books contained within the **Address Book** field. In the example below, the **Dictionary Site** address type is being added to the **Standard Z39.50 Address Book**; a helpful red navigation arrow has appeared to the left of the **Standard Z39.50 Address Book** name to help select your destination.



1. When you drag an **Address** from one **Address Book** to another, the **Address** is *always* copied. If you want the address removed from the **Address Book** for which it was copied, use the **Remove** ("**—**") button.

How to Create a New Address Book

Using the **Address Books** preference window, you can create a new **Address Book** (which can then contain a group of **Addresses**). When a patron searches for an item under a selected **Address Book**, all of the addresses contained in *that* **Address Book** are searched. This makes it easy for patrons to search multiple address types (i.e. **Z39.50 Site**) and collections. For example, you could select an **Address Book** containing every high school in the district, or every high school within a certain zip code (as long as they have WAN codes).

NOTE:
Institutions and schools that are behind a firewall will need to open ports `1025` and `30427` in order to make their collections accessible.

Review the pages listed below to view these step-by-steps in more detail:

- **Adding a New Address Book**; *see page 90*.
- **Duplicating an Address Book**; *see page 90*.
- **Editing the Name of an Address Book**; *see page 91*.
- **Removing an Address Book**; *see page 91*.

Step by Step: Adding a New Address Book

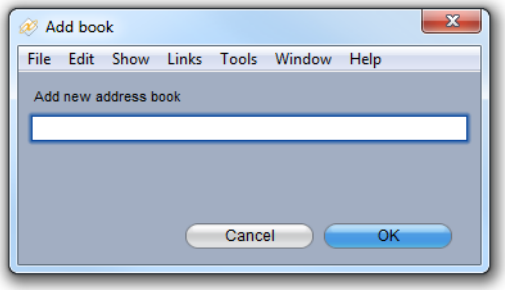
To create a new address book, do the following:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Book** icon in the **System Administration** section of the **System Preferences** window.

Step 3. Click on the **Address Book** tab, click the **Add Book** button on the bottom-left of the **Address Book** system preference window or (Cmnd+N) on Macintosh, (Ctrl+N) on Windows.

Step 4. The **Add Book** window will appear



Step 5. Enter the name of the new **Address Book** you want to add.

Step 6. Click on **OK** to add or **Cancel** to abort.

Step 7. On the top of the main **Address Books** preferences window, click on **Save** to save or **Revert** to cancel.

Step 8. You can now add **Addresses** to your newly created **Address Book** by following the instructions starting on page 92.

Step by Step: Duplicating an Address Book

To duplicate an address book:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Book**s icon in the **System Administration** section of the **System Preferences** window.

Step 3. On the **Address Books** tab, select (highlight) an address book in the **Address Books** field by clicking on it; the **Address Books** field is located on the left-hand side of the **Address Books** preference tab.

Step 4. Once an address book has been selected (highlighted), select **Duplicate** from the **Actions** menu (gear/cog icon), located near the bottom of the **Address Books** field.

Step 5. A **Duplicate Book** window will appear.

Step 6. At this time, enter a unique name for your duplicate address book and click **OK**.

Step 7. Your duplicated address book will appear alphabetically in the **Address Books** field.

Step 8. On the top of the main **Address Books** preferences window, click on **Save** to keep or **Revert** to discard the duplication.

Step by Step: Editing the Name of an Address Book

To edit the name of a non-system address book:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. On the **Address Books** tab, double-click on an address book in the **Address Books** field.

Step 4. An **Edit Book Name** window will appear, asking you to provide a new name for the selected address book.

Step 5. Change the name of your existing (non-system) **Address Book**.

Step 6. Click on **OK** to add or **Cancel** to cancel.

Step 7. On the top of the main **Address Books** preferences window, click on **Save** to keep or **Revert** to discard.

Step 8. Please remember that you are only allowed to edit the names of non-system address books and you will be *unable* to change the name of system address books (i.e. **Standard Address Book**).

Step by Step: Removing an Address Book

To remove an **Address Book**:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. To remove an address book, select (highlight) one from the **Address Books** field by clicking on it once.

Step 4. You may click the **Remove** button on the bottom-left hand side of the **Address Books** field.

Step 5. A **Remove Book** window will appear, asking if you're sure you want to remove the currently selected book.

Step 6. Click **Yes** if you are sure and **No** if you are uncertain.

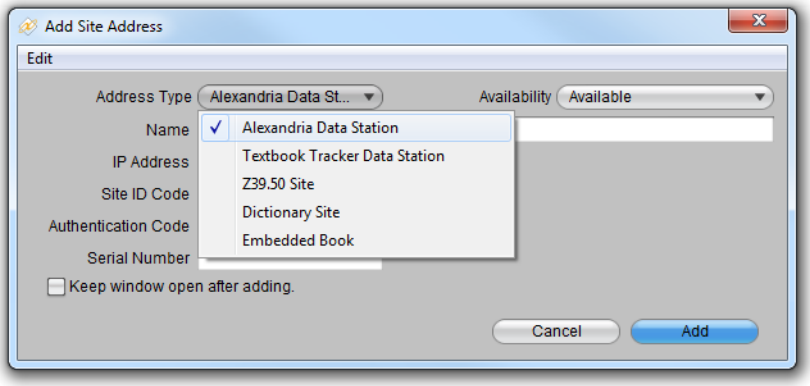
Step 7. Once you have finished, press **Save** to keep the changes or click **Revert** to undo them.

Adding, Duplicating, Editing, Moving, and Removing Addresses

Choose **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, or **Embedded Book** as the address you'd like to add from the **Address Type** drop-down menu. The text fields and drop-down menus of the **Add Site Address** window will vary depending on the **Address Type** selected.

Address Type Settings

Choose **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site**, or **Embedded Book** as the address you'd like to add from the **Address Type** drop-down menu. The text fields and drop-down menus of the **Add Site Address** window will vary depending on which **Address Type** is selected. Listed below you will find some explanations of these **Address Type** settings and selections.



Availability—This drop-down menu determines whether this address will be available to everyone, hidden on Researcher Workstations, or hidden from everyone altogether. This selection is available for *all* address types.

Name—Use this field to name your new address book (e.g. `Central Library` or `My Data Station`). This field is available in *all* address types.

IP Address—Using this field, supply the IP address of the machine for which you are trying to connect. Leave this field blank if you only want to search your local collection (i.e. your Data Station). This field is available in all address types *except for* **Embedded Book**.

Site ID Code—A Central Union Data Station houses multiple collections under one static IP address. Those who are licensed Central Union users can use the **Site ID Code** field to specify a single, searchable library collection within that database.

For example, let's say that there are ten different library collections all stored on one Central Union Data Station. If you would like to create an individual address for each of these ten collections, you will need some way to distinguish one from another. Because these collections all use the same IP address, you will need to supply each address that you create with an specific **Site ID Code**. When you choose to search an address that has a specified **Site ID Code**, then only that library will be searched (instead of every collection contained on the Central Union Data Station). This is only available in **Alexandria** and **Textbook Tracker Data Station** address types.

Authentication Code—An **Authentication Code** is an optional, added level of security. If you only want specific, pre-determined Data Station(s) connecting to your Data Station's library collection, you can require them to have an **Authentication Code** that you create and provide in this field. This code may be changed at any time, but a client's **Authentication Code** *must* match the Data Stations' in order for outside systems to search the indicated collection. This is only available for **Alexandria** and **Textbook Tracker Data Station** address types.

Serial Number—The serial number of the Alexandria Data Station is required else **Cross Data Station** reporting won't be available. This is only available for **Alexandria** and **Textbook Tracker Data Station** address types.

Database—During a Researcher Workstation search, users will be routed to the Z39.50 database that they have indicated in this field. This selection is only available for **Z39.50 Site**.

Port—This is the port required by Alexandria in order to successfully search a specified Z39.50 database. Default is 210. This selection is only available for **Dictionary** and **Z39.50 Site**.

Username and Password—In order to access them, some Z39.50 servers require a username and password. If they are required and you know them, provide them in the allotted spaces. Please keep in mind the case sensitivity of usernames and passwords. These fields are only available for **Dictionary** and **Z39.50 Site**.

Search Order—Choose your **Search Order**. Our software will only ever search two Z39.50 servers at a time; these servers are searched in a known order determined by the **Search Order** selected from this drop-down menu. One advantage of using the **Search Order** drop-down is that you are able to tell which sites are returning results and which are not. In other words, if a particular **Search First** server isn't returning any results, you may choose to remove it, to **Hide Everywhere**, pick a different server, or change it's search order to **Search Last**. A good strategy is to *only* select site(s) that you think will return the most complete, accurate information. After all, you only need one complete record to match, not 100 of them—therefore, choosing 100 sites to **Search First** isn't necessarily better than picking 4.

Treat As Search Group—This selection can be used one of two ways. Operators can drag-and-drop *address books* into the *addresses* of existing address books to create *submenus*—if you have **Treat As Search Group** checked, then searches are performed across *all* the Data Stations contained within the address book (including submenus and groups). This checkbox is only for **Embedded Book** address types.

Keep window open after adding—If you are going to be adding multiple addresses, check this box to keep the **Add Site Address** window open after you have successfully added an address. This checkbox is available for *all* address types.

For further detail and more in-depth information about **Address Type** settings, please search for and review corresponding sections in our Online Help documentation.

Adding, Duplicating, Editing, and Removing an Address

Review the pages listed below to view these step-by-steps in more detail:

- **Adding Addresses to an Address Book***; see page 94.*
- **Duplicating an Address***; see page 95.*
- **Editing an Address***; see page 95.*
- **Removing an Address from an Address Book***; see page 96.*
- **Copying an Existing Address to a Different Address Book***; see page 96.*

Step by Step: Adding Addresses to an Address Book

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. On the **Address Books** tab, click on (select or highlight) an *address book* name in the **Address Books** field (located on the left-hand side of the **Address Books** window); preferably the one for which you'd like to add a new **Address**. Your new *address* will appear in the **Addresses** section of the **Address Books** preference window.

Step 4. Click the **Add Address** ("**+**") button located below the **Addresses** section of the **Address Books** window.

Step 5. An **Add Site Address** window will appear.

Step 6. Using the **Add Site Address** window, choose the type of address you'd like to add from the **Address Type** drop-down menu. The **Add Site Address** window options will vary depending on the **Address Type** you choose. Some **Address Type**(s) may not be available if your data is not registered for a particular feature or module (e.g. **Z39.50 Site**).

Step 7. If you are going to be adding an additional address after you have finished the one you are currently working on, check the **Keep window open after adding** box.

Step 8. You may click **Add** to continue to add *addresses* to your *address book* as necessary. When you are done, or **Cancel** to close the **Add Site Address** window without applying any of your changes.

Step 9. Once all **Address Book** changes have been made, click the **Add** button. Then, click the **Save** button on the **Address Book** window to save all your changes or **Revert** to undo them all.

Step by Step: Duplicating an Address

To duplicate an address:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. On the **Address Books** tab, select (highlight with a click) an address from the **Addresses** field by clicking on it once.

Step 4. After an address has been selected (highlighted), select **Duplicate** from the **Actions** menu, located near the bottom of the **Addresses** field.

Step 5. A **Duplicate Site Address** window will appear.

Step 6. Specify a name for your duplicate address and click **OK**.

Step 7. The new address will appear at the bottom of the **Addresses** field.

Step 8. On the top of the main **Address Books** preferences window, click on **Save** to keep or **Revert** to erase the duplication.

Step-by-Step: Editing an Address

To edit an address:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. On the **Address Books** tab, double-click on the site address you wish to change in the **Addresses** field; alternately, you can select (highlight with a click) the address you wish to change from the **Addresses** field and selecting **Edit** from the **Actions** menu, located near the bottom of the **Addresses** field.

Step 4. An **Edit Address** window will appear

Step 5. Change the name of your existing (non-system) **Address Book**.

Step 6. Make the changes you desire, then click **OK** to keep the changes or press **Cancel** to restore them to their previous settings.

Step 7. On the top of the main **Address Books** preferences window, click on **Save** to keep or **Revert** to undo your changes.

Step by Step: Removing an Address from an Address Book

To remove an address (from an address book):

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. To remove a specific address, select (highlight) the corresponding address book from the **Address Books** field by clicking on it once.

Step 4. You may then select (highlight with a click) the *site address* you want removed from the **Addresses** field and click the **Remove Address** button, located at the bottom of the **Address** field.

Step 5. On the top of the main **Address Books** preferences window, click on **Save** to keep or **Revert** to restore your deleted address.

Step by Step: Copy Existing Address to a Different Address Book

To copy an existing address to a different address book:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Address Books** icon in the **System Administration** section of the **System Preferences** window.

Step 3. If a specific *site address* has already been added to an **Address Book**, you can copy it into another *address book* by selecting (highlighting) it and dragging it from the **Addresses** field and dropping it onto the name of an address book listed in the **Address Books** field.

Step 4. On the top of the main **Address Books** preferences window, click on **Save** to keep or **Revert** to undo your copied address.

Terminology Preferences

Step-by-Step: Customizing Terminology

The **Terminology System Preferences** allows those who use Alexandria outside of the United States to have complete customization over their local vocabulary and currency standards. Changes made in these preference tabs will take effect immediately.

You should only need to use the **Currency** and **Dates** preferences if you are in a country outside the United States. However, operators from *any* country may use the **Patron** and **Item** tabs to adapt terminology to suit their local needs and/or specialized environment.

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Terminology** icon in the **System Administration** section of the **System Preferences** window.

Step 3. Go ahead and get familiar with the **Currency** and **Dates** tabs; however, if your site resides in the United States, you shouldn't need to adjust a thing.

Step 4. Adjust the preferences options in your **Patron** and **Item** tabs accordingly.

Step 5. Click on **Save** in the upper-right corner of the window.

Currency tab

The **Currency** tab allows you to customize currency standards for use in Alexandria.

Use System Settings—If checked, local currency standards will be automatically imported (and implemented) from the Data Station's operating system and registration codes. These standards will be displayed in the **Currency** fields and appear uneditable. However, if this box is unchecked, you may edit the currency settings manually. Keep in mind that this will *only* change your Alexandria currency standards, it will not affect your operating system settings.

Implied Decimals—This value, which *must* be between `0` and `4`, determines how many *implied* decimals (numbers after the decimal point) are used for your local currency standards. For example, `2` is the correct value for United States currency.

Currency Symbol—Currently, only a single-character currency symbol is supported (e.g. as in "`$`" for United States currency).

Decimal Symbol—Specify the symbol used as the decimal point (e.g. as in "`.`" for United States currency).

Grouping Symbol—Specify the symbol used as the grouping separator (e.g. as in "`,`" for thousands in United States currency). Currently, only 3-digit groupings are supported.

Get from O/S—Pressing this button will automatically import localized currency settings from your Data Station's operating system.

Dates tab

The **Dates** tab allows you to customize date formats for use in Alexandria.

Short Date Format—The short date format would typically be set as '`M/D/Y`' if you want month first, providing output like `3/14/12`, or '`D/M/Y`' to put the day first, as in `14/3/12`. Remember, date input will be parsed according to this format and the date separator will be set based on the separator used here. Default is `M/D/Y`.

Normal Date Format, With Day—The normal date format, with day, will typically be set as '`W M D, Y`' if you want the month first, providing output like `Wed. Mar 13, 2012`, or '`W D M, Y`' to put the day first, as in `Wed. 14 Mar, 2012`. Default is `W M D, Y`.

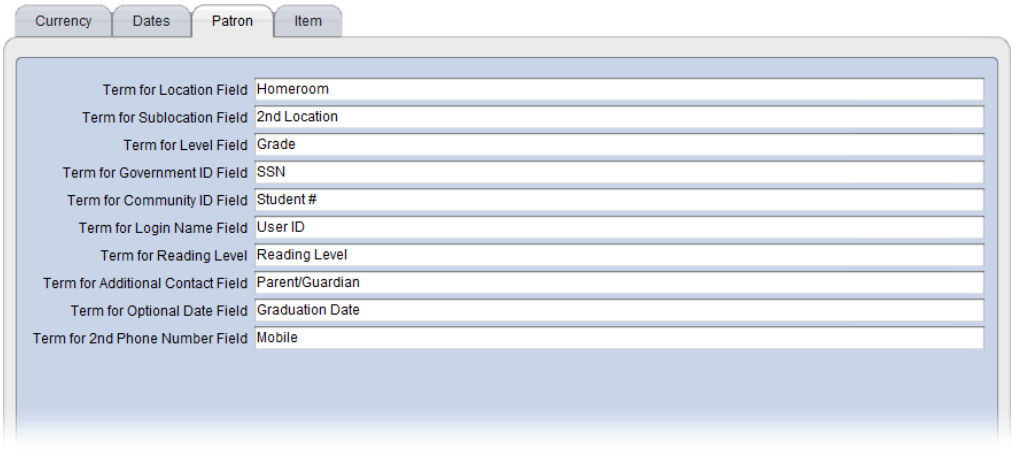
Normal Date Format, No Day—The normal date format, no day, will typically be set '`M D, Y`' if you want the month first, providing output like `Mar 14, 2012`, or '`D, M, Y`' to put the day first, as in `14 Mar, 2012`. Default is `M D, Y`.

Long Date Format, With Day—The long date format, with day, will typically be set as '`W M D, Y`' if you want the month first, providing output like `Wednesday, March 14, 2012`, or '`W D M, Y`' to put the day first, as in `Wednesday 14 March, 2012`. Default is `W M D, Y`.

Long Date Format, No Day—The long date format, no day, will typically be set as '`M D, Y`' if you want the month first, providing output like `March 14, 2012`, or '`D M, Y`' to put the day first, as in`14 March, 2012`. Default is `M D, Y`.

Patron tab

Use this tab to customize terminology for various patron-related fields within Alexandria, including those in the **Patron Management** window. Long terms may be cut off in various areas of the program; it is better to keep them short and succinct.



Term for Location Field—This preference lets you configure the term used for the **Location** field. For example, you may want to use the term "`Homeroom`" rather than "`Location`."

For school libraries, this defaults to "`Homeroom`"; for other libraries, this defaults to "`Location`."

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "`1`", "`2`", "`402`", you'd insert "`001`", "`027`", "`402`". Basically, in order to sort properly, *all entries with a numeric range need to have the same number of characters*.

Term for Sublocation Field—This preference lets you configure the term used for the Sublocation field. Although you can change this term, *this guide* will refer to it as "`Sublocation`." Default value is "`2nd Location`."

You can use this field for whatever extra information you may need to enter. For example, you may want to use the term "`Last Period`" to identify an alternate location below the primary **Location** field. The term you choose will appear wherever Alexandria uses the **Sublocation** term. If your school, site, or institution doesn't use the reading level terminology, this field can be used for other info such as AUP (acceptable use policy) status.

Term for Level Field—This preference lets you configure the term used for the **Level** field. For example, you may want to use the term "`Grade`" rather than "`Level`."

For school libraries, this defaults to "`Grade`." For other libraries, this defaults to "`Level`."

Term for Government ID—This field is used for national ID numbers. In the United States, this is typically the Social Security Number. Default value is "`SSN`."

Term for Community ID—This field is used for community or local ID purposes. For school libraries, this defaults to "`Student #`"; for other libraries, this defaults to "`ID #`."

Term for Login Name Field—This field changes the terminology anywhere that a user identification number is required. Generally, this is simply "`Login`" or "`User ID`".

Term for Reading Level—This field is used for reading level terminology anywhere that it is required. Typically, this is simply "`Reading Level`". If your school, site, or institution doesn't use the reading level terminology, this field can be used for other info such as AUP (**a**cceptable **u**sage **p**olicy) status.

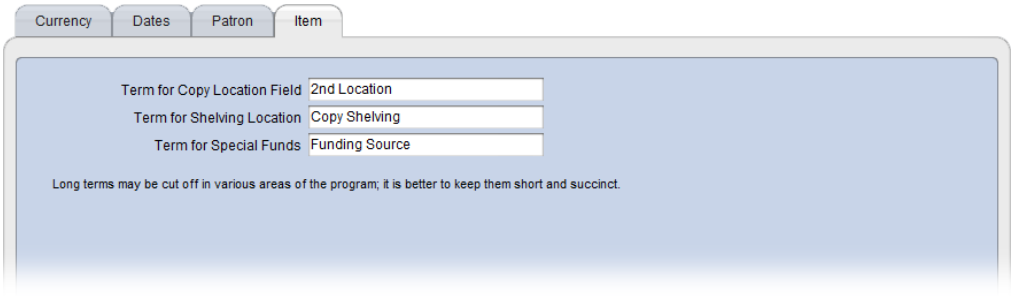
Term for Additional Contact Field—This field is used to change the terminology for emergency or secondary contacts. Default is "`Parent/Guardian`".

Term for Optional Date Field—If you would like to change the terminology for the optional date field, supply it here. Default is "`Graduation Date`".

Term for 2nd Phone Number Field—If you would like to change the terminology for the second phone number field, supply it here. Default is "`Mobile`".

Item tab

This preference allows you customize item-related terms for use within Alexandria, including those found in the **Items** management window. Long terms may be cut off in various areas of the program; it is better to keep them short and succinct.


Currency
Dates
Patron
Item
Term for Copy Location Field
2nd Location
Term for Shelving Location
Copy Shelving
Term for Special Funds
Funding Source
Long terms may be cut off in various areas of the program; it is better to keep them short and succinct.

Term for Copy Location Field—This preference lets you configure the term used for the **Copy Location** field. For example, you may want to use the term "`Collection`" or "`Library Floor`" (for a multi-leveled library) rather than "`Copy Location`."

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "`1`", "`2`", "`402`", you'd insert "`001`", "`027`", "`402`". Basically, in order to sort properly, *all entries with a numeric range need to have the same number of characters*.

Term for Shelving Location—Input the terminology you'd like to use for **Shelving**, an alternative location field that goes into the **852_c** tag.

Term for Special Funds—This field allows you to customize the term used for your special funds. Although you can change this term, *this guide* will use the generic term **Funding Source**. This field allows you to keep better track of where special funding for an item came from. For example, if you have to report the status of items purchased using government grants or special funds, enter the grant number or special fund name in this field. You can then generate reports using this field. Default setting is "`Funding Source`".

Calendar Preferences

Step-by-Step: Creating Calendars

Use the **Calendars** tab to create custom calendars for your library. Alexandria includes a calendar for the current year, previous year, and three years in the future. You can assign a separate calendar to each patron or circulation policy. This allows you to set up calendars for groups of patrons who may be operating on different school levels and/or schedules.

Step 1. Select **Edit** from the main menu followed by **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Calendars** icon in the **Circulation** section of the **System Preferences** window.

Step 3. To change the **Month**/**Year** of the current calendar, use the corresponding drop-down menus located near the top of the calendar field; alternately, you may click **Next** to go forward one month or **Previous** to go back a prior month. The **Current** button returns the calendar to the present month and year.

Step 4. To select an existing calendar, select one from the **Calendars** list on the left-hand side of the window.

Step 5. You can mark days on the calendar as **Period Due** and **Closed** dates by clicking on the actual day. The choices cycle from **Open** (nothing displayed), **Closed**, **Period Due**, and then back to **Open**.

Step 6. Work through the months of the year, marking the dates on which the library is closed (e.g. holidays). Item due dates are calculated so that they never fall on **Closed** dates (only on **Open** or **Period Due** dates). However, please note that there are some exceptions to **Closed** dates when using **Override Dates**. For instance, you can change your preferences to stop fines from accruing on closed days.

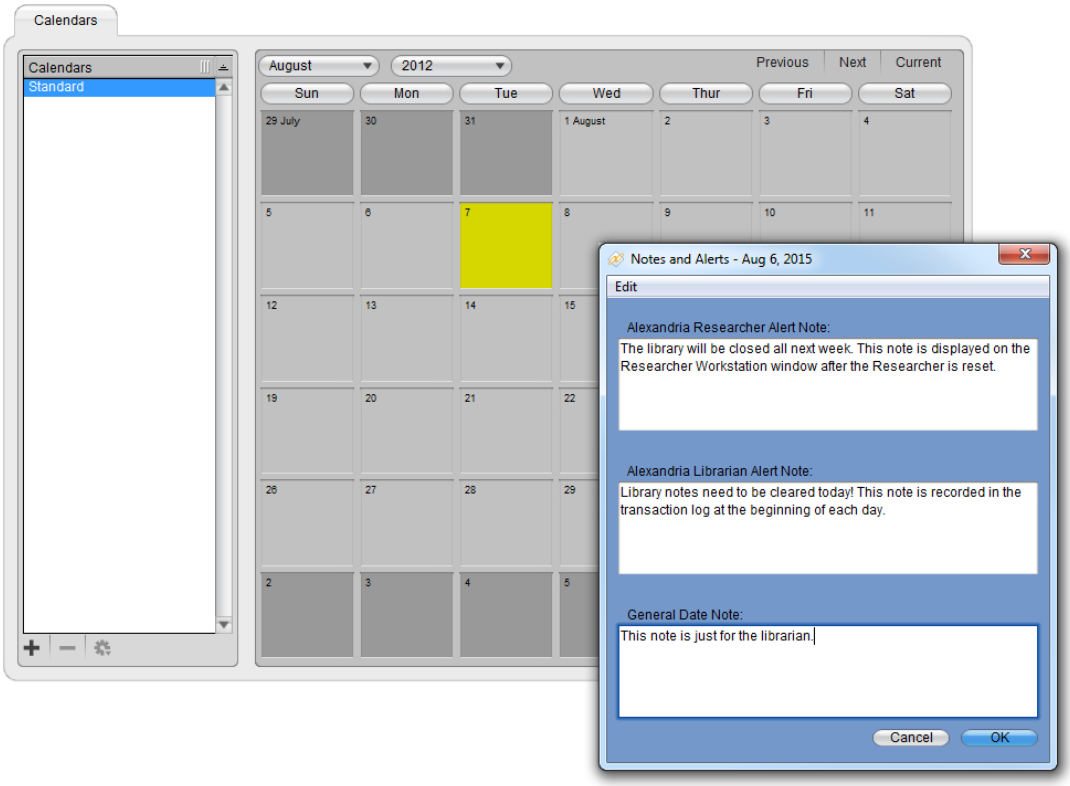
Step 7. To change the **Closed** date for the same day of the week for the entire selected month, click on one of the **Sun** through **Sat** buttons at the top of the calendar.

Step 8. To change the **Closed** date for the same day of the week for the entire year (for example, *every* Saturday), hold down the `<Alt>` (Windows) | `<Option>` (Macintosh) key and click on one of the **Sun** through **Sat** buttons at the top of the calendar.

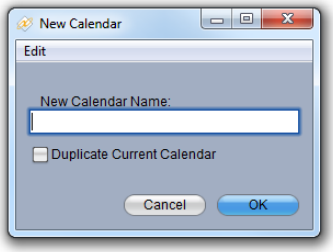
Step 9. Mark the date(s) that you want *all* materials to be returned to your library as **Period Due** (e.g. a particular date near the end of the school year). A **Period Due** date forces an item (on a particular calendar) to be due on *that* day; check your **Policies System Preferences** to **Apply Period Due Dates**. For example, if you set a period due date of September 30, 2012, all books checked out *before* September 30th (that normally would have had a due date *after* the 30th), will be assigned a new due date of September 30th.

Calendars tab

You can <shift-click> on a date to add a note. Notes can be used to display automatic reminders on both Librarian and Researcher Workstations, as well as provide private notes for the librarian and patrons. When you've created a note, an icon will appear on the calendar day. Alert notes are only active for the **Standard** calendar and are ignored on other calendars. **General Notes** are available for all calendars.



To add a new (or delete an existing) calendar:



Step 1. Click the **New** ("**+**") button; a **New Calendar** window will appear.

Step 2. Enter the **New Calendar** name in the blank field.

Step 3. If this new calendar is to be a duplicate of the current calendar (i.e. used as a template for a new one), check the **Duplicate Current Calendar** box.

Step 4. Click on **OK** to save the new calendar and make it current; alternately, click **Cancel** to abort the process.

Step 5. Click **Save** to keep your changes or **Revert** to cancel them

Step 6. To *delete* a calendar, make it the current (i.e. selected) calendar and click the **Remove** ("**—**") button. Any policies that were using the deleted calendar will be reassigned to the **Standard** calendar. You *cannot* delete the **Standard** calendar.

Policy Preferences

Use the **Policies System Preference** window to establish rules that regulate how library resources are used by your patrons; this includes how items circulate, how long items may be checked out, how much overdue fines cost, whether an item can leave the building, how circulation periods are computed, and so forth. **Policies** are important for the purposes of circulation, reports, and statistics.

For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and non-fiction works can be set for two weeks.

Alexandria collects statistics on each group of patrons, such as the types of items they borrow and when they are returned. These statistics are generally used to determine usage patterns for the library so that management can schedule staff accordingly and make educated administrative decisions.

Each group of patrons and items (for which usage statistics are collected) can be assigned a separate policy. For example, if each grade level of students has its own policy, the statistics generated are more useful and accurate than if you only have one policy for all students.

This section will briefly describe how to set up, create, and remove policies; for more detailed information, please review the *"Policies"* section of Alexandria's Online Help.

- NOTE -

Central Union libraries need to realize that **Policies** are global, so that means that everyone needs to "buy in" to making changes, especially for **Item** policies since **Call Number Mapping** might become useless if you do not keep things standard and simple. For instance, if you have a fiction policy that is different for each school, **Call Number Mapping** will not know which fiction policy to use for items that have call numbers beginning with FIC! This could lead to a great deal of extra work every time you import items.

Why Do We Need Policies?

Although you may feel that your needs will be satisfied by the barest, basic statistical data such as number of items checked out for the week, month, or year—you may not realize the powerful statistics that Alexandria can provide. We would like to pose a few thought-provoking questions for you to consider:

- What role do statistics play in your library or district?
- Will you be referring to the statistical data that Alexandria gathers for you?
- Would more detailed statistics be beneficial to you and how?
- Is there a way to achieve *very* detailed statistical data?

Statistical Reports

Alexandria has many statistical report options available. The **Super Summary** report details an amazing amount of statistical data about your collection — number of titles and copies, value, number of lost and discarded copies, collection age, and collection usage — by call number, item policy, and medium. Other reports will show the number of items checked out, renewed, checked in and the number of holds placed in a certain time period. All these are extremely useful statistics; however, there is an additional feature of Alexandria that provides statistics based on combinations of patron and item policies.

Using grouped patron and item policies generates statistical data that will empower you to view your collection with fresh eyes. For instance, a circulation of 3,615 items for the month may sound very impressive, but if you were able to compare the usage of one grade to another grade, you might be surprised by the results. Further, looking at the usage of one patron group compared to another in a particular area of your library collection could also be very informative.

For instance, if you were to use a combination of patron and item policies to see how many biographies were being checked out by eighth graders (since a biography unit is part of their core curriculum) and you discover that absolutely no eighth graders had checked out biographies right before the end of the school year—what could you do? You can take a very close look at your biographies to determine if the reading level is too low, too high, or is *so* outdated that the students do not recognize the names of the people whose biographies you have.

Setting Policies to Achieve Meaningful Statistics

Alexandria comes with two standard patron policies—**Standard Patron** and **System Patron**—and two standard item policies—**Standard Item** and **System Item**.

System Patrons/Items are used by Alexandria to set **Lost** and **Discarded** copies, etc.

Most operators will establish their own policies. Generally, these are kept very simple such as **Student** and **Teacher** or **Book** and **Reference**. Let's look at how we can make these policies provide more meaningful statistics.

To achieve greater detail in your statistics, we suggest a policy (or **Stat Group**[1]) for each specific group of patrons or items that you wish to follow. In a school setting, this might be a policy for each grade or even each grade/gender (e.g. **6th Grade Girls**); however, a public library might want to follow users from a geographical area and/or age (e.g. **Norton Township** or **Norton Township Adults/Children**). Even if the circulation privileges of the group are the same as other groups, you should still create policies that are going to identify the patron groups you wish to follow. With more detail-specific policies, you can now see how many items are being checked out by each of these patron groups. Let's take this idea a bit further by providing more detail in your item policies.

Perhaps you've set your item policies to general groups based upon the length of the checkout period: books for two weeks, reference with no circulation, audio-visual for one week, etc.

Let's break this down a bit more. True, you could have a **Fiction** and a **Non-Fiction** policy instead, but consider being even *more* detailed in setting your policies; instead of just **Non-Fiction**, think of the benefits of having a **000s** policy, a **100s** policy, a **200s** policy, etc.

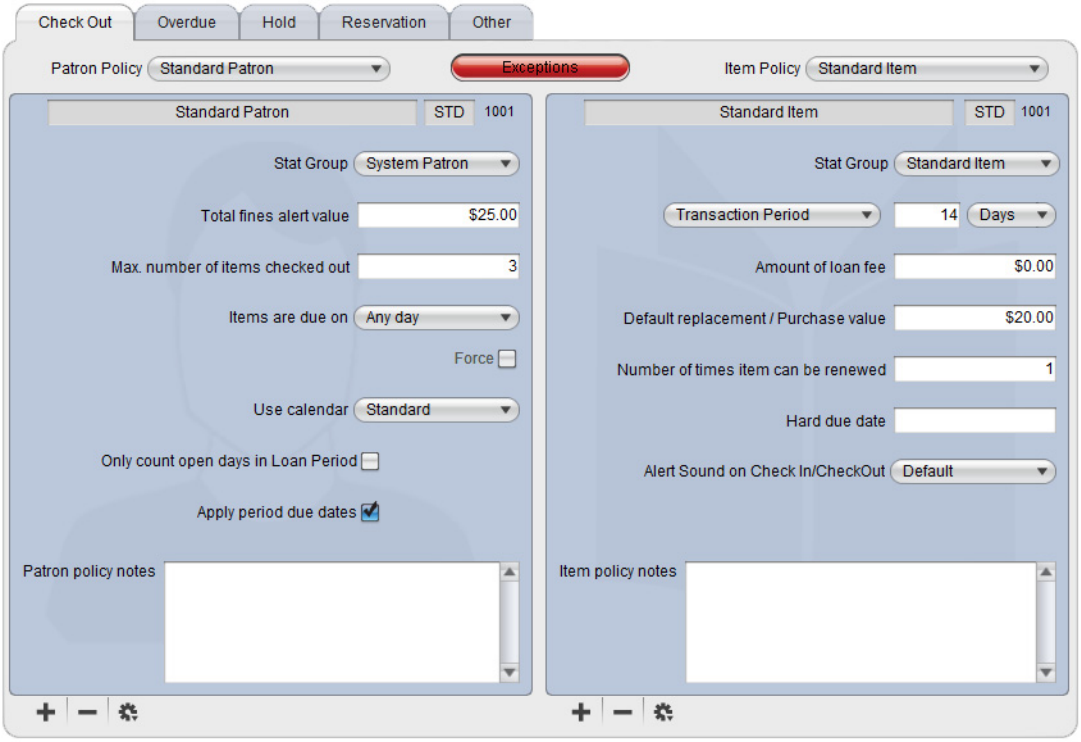
Now, your statistics become *very* useful.

So, what exactly is a **Standard Item** and who is a **Standard Patron**? All of a sudden, these designations seem much less useful when compared to the other statistics mentioned above. Just think about how much more valuable these statistics could be if **Non-Fiction** was divided by the major divisions of the Dewey Decimal system.

1.A **Stat Group** is a way to group policies for statistical reporting.

Using the Policies System Preferences

The **Policies** window is divided into two distinct sections that function independently of one another and allow you to create or customize the settings of a particular (or combined) **Patron** or **Item** policy. An operator can move through any of the tabs that line the top of the window (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**) at any time, no matter the current mode (i.e. **Standard** or **Exceptions**).



Standard Mode

Every patron *must* belong to a **Patron** policy; the rules of a particular **Patron** policy apply to *every* patron under that policy. An **Item** policy will be applied to every item in your collection; the rules of a particular **Item** policy apply to *every* item under that policy.

The settings of a particular **Patron** policy apply to *every* **Item** policy. For example, selecting **3rd Grade** as your **Patron** policy and changing the **Maximum number of items checked out** to 6 will limit *every* patron in the third grade to six items of *any* **Item** policy, whether it be **Fiction** or **Non-Fiction**.

Exceptions Mode

The way that policies interact in **Standard Mode** can be adjusted by clicking the **Exceptions** button to enter **Exceptions Mode**. This mode allows you to further customize your policy settings by modifying the relationship between a specific (selected) patron and item policy.

Exceptions can be made to every policy combination via the text fields, drop-down menus, and checkboxes contained in the **Policies** tabs.

For example, if you usually allow your **4th Grade** patrons to check out five items at a time, but you only want them to be able to check out three music CDs, select the **4th Grade** (**Patron**) policy on the left and the **Music CDs** (**Item**) policy on the right, click the **Exceptions** button (it should turn red), and then change the **Max items of THIS TYPE checked out** to the number 3.

Any **Policies** tab that contains an exception will display an **Alert** icon to the left of the tab name. This indicates that an exception is present on *that* tab for the selected **Patron**/**Item** policy combination. If you click on this tab, you'll notice that the **Exceptions** button has turned yellow, indicating that an exception is present.

While in **Exceptions Mode**, a red focus box will appear around any field, drop-down menu, or checkbox in the **Policies** tabs (**Patron** or **Item**) that contains an exception, making it clear that the data shown in the field is an exception to the default setting.

To remove a particular exception, select (highlight) the field, drop-down menu, or checkbox that contains the exception and select **Remove Selected Exception** from the relevant **Actions** menu. You may also select **Remove All Exceptions** from either **Actions** menu to remove all of the exceptions from both the selected patron and item policy.

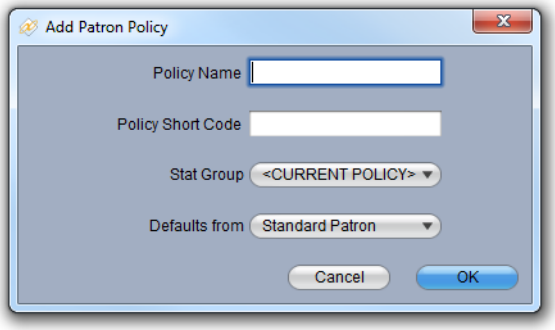
Getting Started: Creating New Patron Policies

Now that you're convinced that more detailed **Patron** policies are the way to go, here are some steps to follow:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click the **Policies** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Click the **Add** ("**+**") button in the lower-left hand side of the **Patron** policy section.



Step 4. Enter the new **Patron Policy Name** and **Patron Policy Short Code** and select an optional **Stat Group**[1] in the fields provided.

Step 5. Make a selection from the **Defaults from** drop-down menu and then press `<enter>` or click **OK**; the new policy will take its configuration defaults from whatever existing policy is selected from this drop-down menu.

Step 6. Next, tab through the various **Policies** (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your new policy.

Step 7. When you've completed your new policy, click the **Save** button.

Step 8. Repeat this process until you've created all the new patron policies you desire.

- NOTE -

Using the **Restore From Defaults** selection from the **Actions** menu is independent of the current **Policy** mode. For instance, if you use **Restore From Defaults** while in **Exceptions Mode**, it will create exceptions for any value that has been modified.

Restoring defaults will revert the policy fields, drop-down menus, or checkboxes to the values that were provided when the policy was initially created.

1.A **Stat Group** is a way to group policies for statistical reporting.

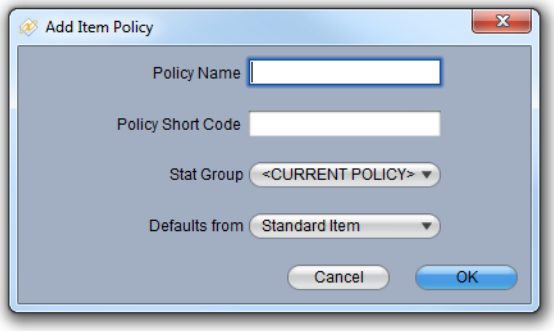
Getting Started: Creating New Item Policies

Now, following these steps, create your own **Item** policies:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Click the **Add** ("**+**") button in the lower-left hand side of the **Item** policy section.



Step 4. Enter the new **Item Policy Name** and **Item Policy Short Code** and optional **Stat Group**[1] in the fields provided.

Step 5. Make a selection from the **Defaults from** drop-down menu and then press `<enter>` or click **OK**; the new policy will take its configuration defaults from whatever existing policy is selected from this drop-down menu.

Step 6. Next, tab through the various **Policies** (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your new policy.

Step 7. When you have completed your new policy, click on the **Save** button.

Step 8. Repeat this process until you have created all the new item policies you desire.

- NOTE -

Many school libraries or public libraries create policies based on medium type or call number range. Alexandria will not automatically change or set any item's policy just because a policy matches the medium type or call number range. The librarian must set the item's policy either during an item import, running the **Utilities — Copies — Replace Information** or manually in the **Items** management window.

1.A **Stat Group** is a way to group policies for statistical reporting.

Getting Started: Creating an Exception

To create or modify a circulation policy:

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Circulation** section of the **System Preferences** window.

Step 3. From the drop-down menu, select the **Patron Policy** that, when combined with an **Item Policy**, will create an exception.

Step 4. Next, from the drop-down menu, select the **Item Policy** that, when combined with your selected **Patron Policy**, will create an exception.

Step 5. Click the **Exceptions** button (it should turn red).

Step 6. Go through the various **Policies** tabs (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**), changing the values of the text fields, drop-down menus, and checkboxes as needed.

Step 7. When you have successfully created your exceptions, click the **Save** button.

- NOTE -

Changing a policy will *not* affect past transactions. The only two ways to change the fine rate on a book that is currently checked out is to check in the book, forgive the fine, and check out the book to the same patron for the old due date (using a manual override date) or to use the **Utilities — Circulation — Update** utility.

Patrons Preferences

Step-by-Step: Patrons System & Site Preferences

Use the **Patrons System Preferences** to configure grade tables, default pictures and policies, and other general information about your patrons, including the **Patron Server** (if you're a licensed user).

System Preferences

Step 1. Before we start, please note that **Patrons** preferences exist in both your **System** *and* **Site Preferences**; you may have to make adjustments in each area.

Step 1. First, select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Patrons** icon in the **Management** section of the **System Preferences** window.

Step 3. From the **Rules** tab, check whether you want to keep patron history and whether or not to disable patron expiration dates.

Step 4. Next, use the **Grade Table** tab to create the grade levels that are used at your school or institution.

Site Preferences

Step 5. Now, select **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) from the main **Edit** menu bar.

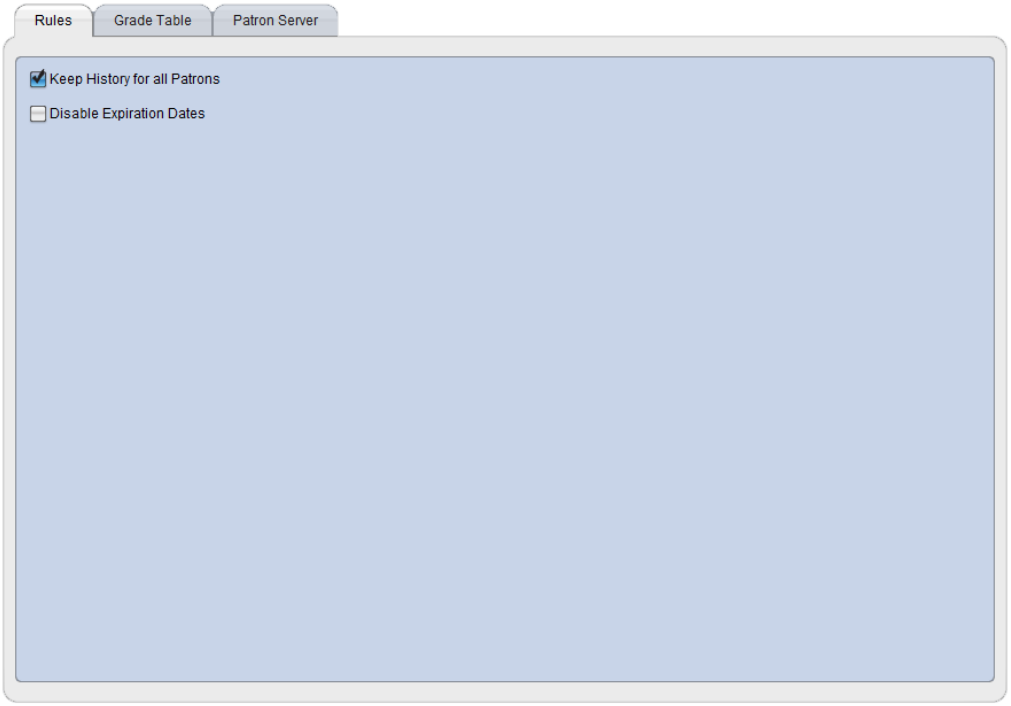
Step 6. Click on the **Patrons** icon in the **Management** section of the **Site Preferences** window.

Step 7. If desired, using the **Default Pictures** tab, you can adjust the generic **Male**, **Female**, or **Unknown** graphical placeholders for patrons; *see page 117*.

Step 8. Under the **Patrons** tab, set the **Default [Patron] Policy** and the **Next [Patron] Barcode** that Alexandria should use for newly created/imported patrons.

Step 9. Click on **Save** in the upper-right corner of the window.

System Preferences: Rules tab



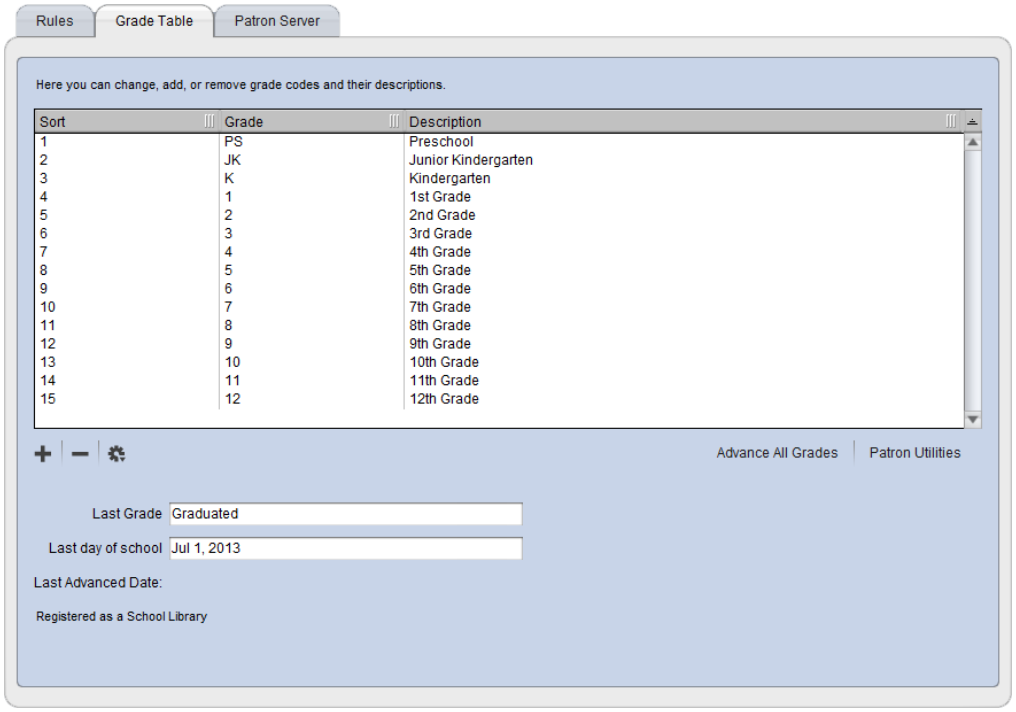
Rules Setting

Keep History for all Patrons—Check this box if you want Alexandria to keep a transaction history for all the patrons who use your library.

Disable Expiration Dates—When checked, Alexandria will ignore a patron's **Card Expiration Date** and hide the **Card Expiration Date** field in **Patrons** management window *(for more information, please review the "Personal Info tab" section of Alexandria's Online Help)*.

System Preferences: Grade Table tab

Use the **Grade Table** tab to create the grades that are used in your school. Most third party school information systems are capable of including **Grade**/**Level** in their export files. However, those who are unable to import **Grades** along with their patrons can still assign grades by graduation date using the patron **Replace Information** utility *(see "Performing Utilities" on page 203.)*.

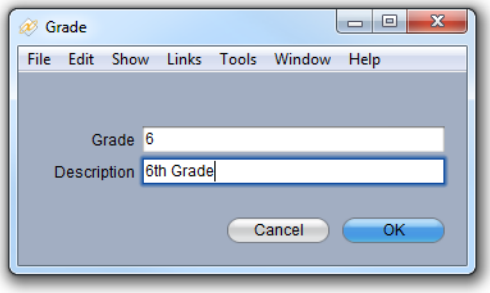


The **Grade** field is a simple list where the operator can enter each grade level for their school in the order they should be sorted and incremented. This field is also "drag-and-drop" enabled so that operators can change the grade/level order as necessary when new grades are added or existing grades are eliminated.

The top selection in the **Grade** field will be the first grade level, the second will be the next grade level, and so on. The names of the **Grades** in the table are fully customizable, allowing administrators to use whatever terms they desire.

Grades must be advanced manually at the end of each school year by using the **Advance All Grades** button or **Advance Patron Grades** utility. Using this functionality at the end of each year, you can advance your patrons to the next grade level until they reach graduation.

Click on the **Add** button (the "**+**" symbol) to add a new grade to the grade table. This option is also available from the **Actions** drop-down menu.



If you would like to remove a grade from the table, highlight (select) the grade that you want removed and click on the **Remove** button (the "**—**" symbol). This option is also available from the **Actions** drop-down menu

If you would like to edit an existing grade in the table, highlight (select) the grade that you want to change and select **Edit** from the **Actions** drop-down menu.

Grade Table Settings

Last Grade—This operator-defined field indicates your patron's highest (and final) level of advancement. Default is **Graduated**; the field cannot be left blank.

Last day of school—Used to compute the grade when importing `StudentPersonal` objects using SIF. Never rearrange the grade table if you are importing with SIF. Changing the **Last day of school** (graduation date) *does not* advance a **Grade**; changing a **Grade** *does not* change the graduation date.

Last Advanced Date—This shows when the last **Advance Grade** utility was performed; the date is updated when the **Advance Grade** utility completes its operation.

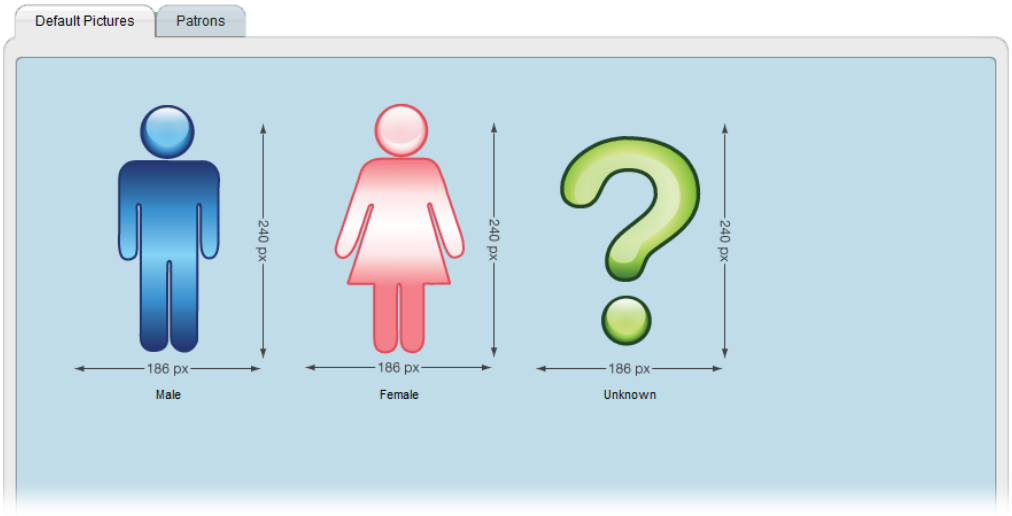
Advance All Grades—This button moves every patron with a grade defined in the **Grade** table up one level each time it's pressed. COMPanion recommends that you perform an **Archive** before using the **Advance All Grades** button. Patrons whose grade can not be found or (is not) defined in the **Grade** field *will not* advance.

Patron Utilities—This button opens the **Utilities** window with the **Advance Grade** utility selected.

Site Preferences: Default Pictures tab

If you haven't yet attached portraits to patron records (using either **Import Patron Pictures** or the **Patron Management** window), you can apply generic **Male**, **Female**, or **Unknown** graphical placeholders to patrons based on their **Sex** field.

The **Default Patron Pictures** preference window allows you to drag-and-drop your own `GIFs`, `BMPs`, `PCTs`, `PNGs`, `JPGs` (or most standard image files) onto each of the default **Patron Picture** fields. Once this is done, a new default patron picture placeholder is applied. You can restore the default patron placeholder pictures by left-clicking a patron picture and selecting **Reset From Defaults**. Take care when you make this selection, however—it will restore *all* of the default pictures at once.



Step-by-Step: Apply A New Default Patron Picture

Follow these steps to apply a new default patron placeholder picture:

Step 1. Select (highlight) which of the three default patron pictures you would like to change (e.g. **Male**, **Female**, or **Unknown**).

Step 1. New default patron images should measure no larger than *186* pixels wide by *240* pixels high.

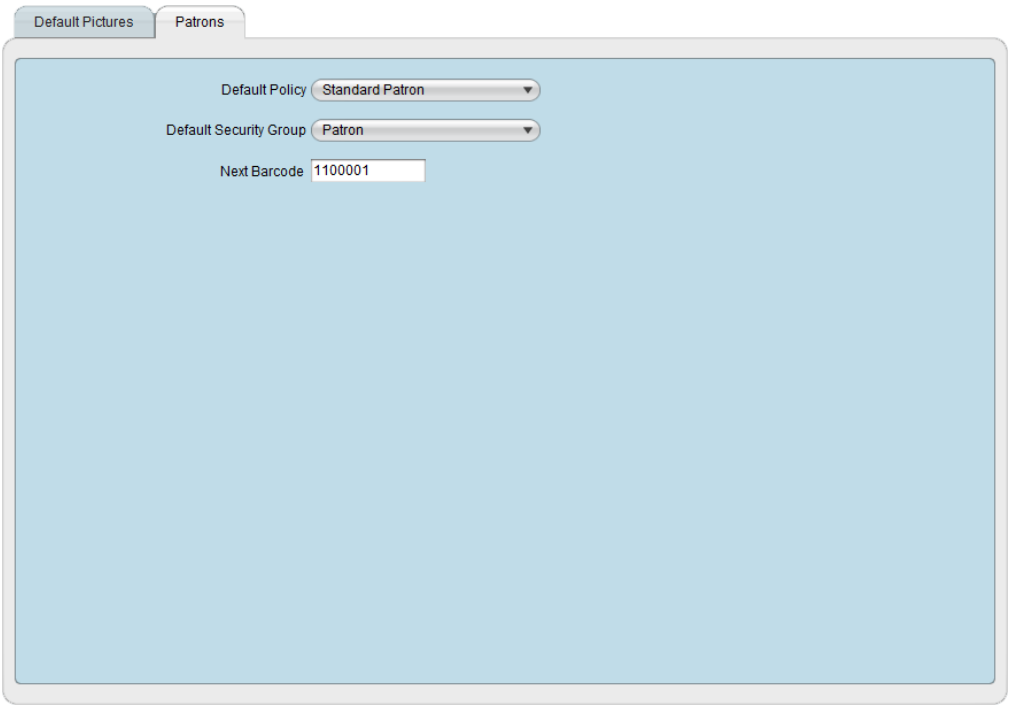
Step 1. New default patron images can be `GIFs`, `BMPs`, `PNGs`, `PICs`, `JPGs` (or most standard image files).

Step 2. Drag-and-drop your new default patron image on to the **Default Patron Picture** field. Images can also be pasted (Cmnd/Ctrl+V) into one of the **Default Patron Picture** fields from your operating system standard clipboard.

Step 3. Click **Save** to apply your changes or **Revert** to discard them.

Site Preferences: Patrons tab

Using the **Patrons** tab, set the **Default Patron Policy** and the **Next Barcode** that Alexandria or should use for a patron.



Patrons Settings

Default Policy—Using this drop-down menu, you can set the default patron policy for newly-added members. If you assign a patron policy that is later removed from the system, the **Default Policy** will return to **Standard Patron**.

Next Barcode—This field contains the next available patron barcode number. When you create a new patron, Alexandria will automatically assign them *this* barcode (unless you assign them a number manually). You should set this field when you first configure Alexandria so that any new patrons you import or create are assigned a patron barcode number that coincides with your numbering strategy.

Items Preferences

Step-by-Step: Items System & Site Preferences

Not all of the preferences in the **Management** tab need to be configured when performing your initial setup of Alexandria. Listed below are those that COMPanion suggest that you set immediately:

System Preferences

Step 1. Before we start, please note that **Items** preferences exist in both your **System** *and* **Site Preferences**; you may have to make adjustments in each area.

Step 2. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 3. First, click on the **Items** icon in the **Management** section of the **System Preferences** window.

Step 4. If there is a MARC tag and subfield where the **Local Call Number Tag** is to be stored, provide it in this field. If the **Local Call Number Tag** is used for an identifier in a **Central Union** environment, *do not* enter one.

Step 5. If you wish to use your existing call numbers instead of pulling from the call number tags that may be included in imported MARC records, check the **Preserve Existing Call Numbers** box.

Step 6. Configure any other preferences on the **Management** tab by checking the appropriate box(es), making a selection from the drop-down menu(s) or providing information in blank text fields.

Site Preferences

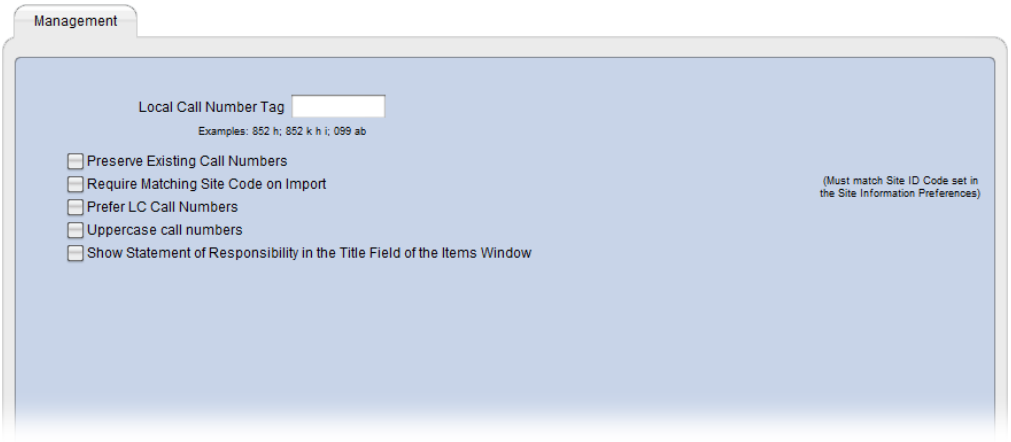
Step 7. Now, select **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) from the main **Edit** menu bar.

Step 8. Click on the **Items** icon in the **Management** section of the **Site Preferences** window.

Step 9. Provide the **Next [Item] Barcode** to be used during cataloging or importing. Please note that this *must* be set individually for each school/library/site.

Step 10. Click on **Save** in the upper-right corner of the window.

System Preferences: Management tab


Management
Local Call Number Tag
Examples: 852 h; 852 k h i; 099 ab
Preserve Existing Call Numbers
Require Matching Site Code on Import
Prefer LC Call Numbers
Uppercase call numbers
Show Statement of Responsibility in the Title Field of the Items Window
(Must match Site ID Code set in the Site Information Preferences)

Management Settings

Local Call Number Tag—During import, if your call numbers are not kept in the customary location within the MARC record (Alexandria uses **852_a**), use this preference to configure where Alexandria should check first for the call number.

If you enter a valid "tag_subfield," Alexandria will scan that section of the MARC record to find the call number. If your call numbers are typically in tag **900a**, enter **900a** in this field.

Preserve Existing Call Numbers—When this box is checked (default), existing call numbers will never be modified during an import or during automatic SmartMARC record updating.

Require Matching Site Code on Import—When this box is checked, only copy information with your site code (or lack thereof) in the **852_a** tag is imported (must match the **Default Site ID Code** set in your **Site Information System Preferences**, page 61). All other records with site codes are ignored.

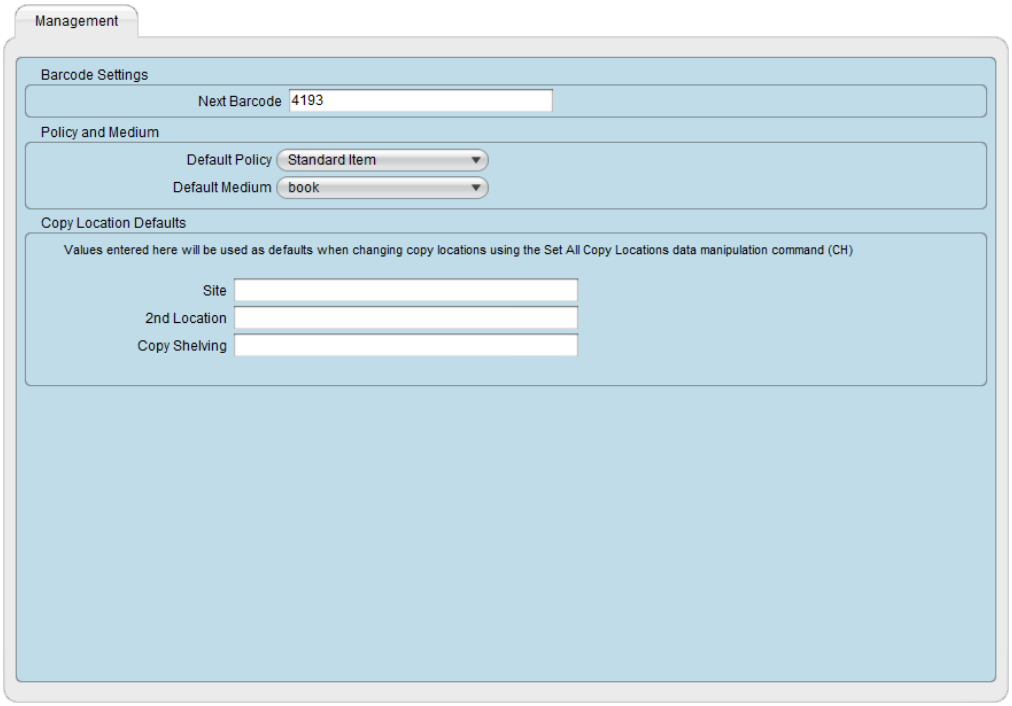
This preference is especially useful to districts that keep a Central Union catalog containing *all* district holdings. When these records are transferred to an individual library, each title may contain holding information for other sites in the district. This option allows each library to import the holding records that belong only to that library. Other holding records are automatically removed from the MARC record before it's saved.

Prefer LC Call Numbers—When this box is checked, Alexandria looks first for a Library of Congress Call Number (in the **050** tag) when looking for call numbers in an imported MARC record. If no **050** tag is found, Alexandria will then look for call numbers in other tags. Do *not* check this preference if you use Dewey call numbers.

Uppercase Call Numbers—When this box is checked, alphabetic characters in call numbers will be saved and shown in uppercase.

Show Statement of Responsibility in the Title Field of the Items Window—When this box is checked, Alexandria shows the Statement of Responsibility (tag **245_c**) in the title field of the **Items** management window. When not checked, the Statement of Responsibility is hidden.

Site Preferences: Management tab


Management
Barcode Settings
Next Barcode 4193
Policy and Medium
Default Policy Standard Item
Default Medium book
Copy Location Defaults
Values entered here will be used as defaults when changing copy locations using the Set All Copy Locations data manipulation command (CH)
Site
2nd Location
Copy Shelving

Barcode Settings

Next Barcode—This field contains the next available item barcode number. When you create a new copy record, Alexandria will automatically assign them *this* barcode (unless you assign a number manually). You should set this field when you first configure Alexandria, so that any copies you create or import are assigned an item barcode number that coincides with your numbering strategy.

Policy and Medium

Default Policy—Using this drop-down menu, you can set the default item policy for newly added records. The default is **Standard Item**. If you assign an item policy that is later removed from the system, the **Default Policy** will return to the **Standard Item**.

Default Medium—Using this drop-down menu, you can set the default item medium for newly added records. Default is **Book**.

Copy Location Defaults

Values entered here will be used as defaults when changing copy locations using the **Set All Copy Locations** data manipulation command ("CH"). Also, during the data import process, if a **Site ID Code** being imported doesn't match any that exist in the **Sites** management window, they will be replaced with the default **Copy Site** code defined below.

Copy Site— Default value for the copy institution field when changing copy locations.

Copy Location— Default value for the copy location field when changing copy locations.

Copy Shelving— Default value for the copy sublocation field when changing copy locations.

Barcodes Preferences

Step-by-Step: Barcodes

The **Barcodes System Preferences** allow you to configure how Alexandria should increment new patron and item barcode numbers. On these preference tabs, you will configure the barcode range for temporary items and establish any special barcode handling. For instance, if your data contains any Follett Interleaved 2 of 5 barcodes, you would indicate that here.

System Preferences

Step 1. Before we start, please note that **Barcodes** preferences exist in both your **System** *and* **Site Preferences**; you may have to make adjustments in each area.

Step 2. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 3. Click on the **Barcodes** icon in the **System Administration** section of the **System Preferences** window.

Step 4. If your item/patron barcodes have a leader that should be skipped, enter the leader in the **Special Handling** tab. Also use the **Special Handling** tab to configure how Alexandria handles new barcodes assigned to patrons and/or items.

Site Preferences

Step 5. Now, select **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) from the main **Edit** menu bar.

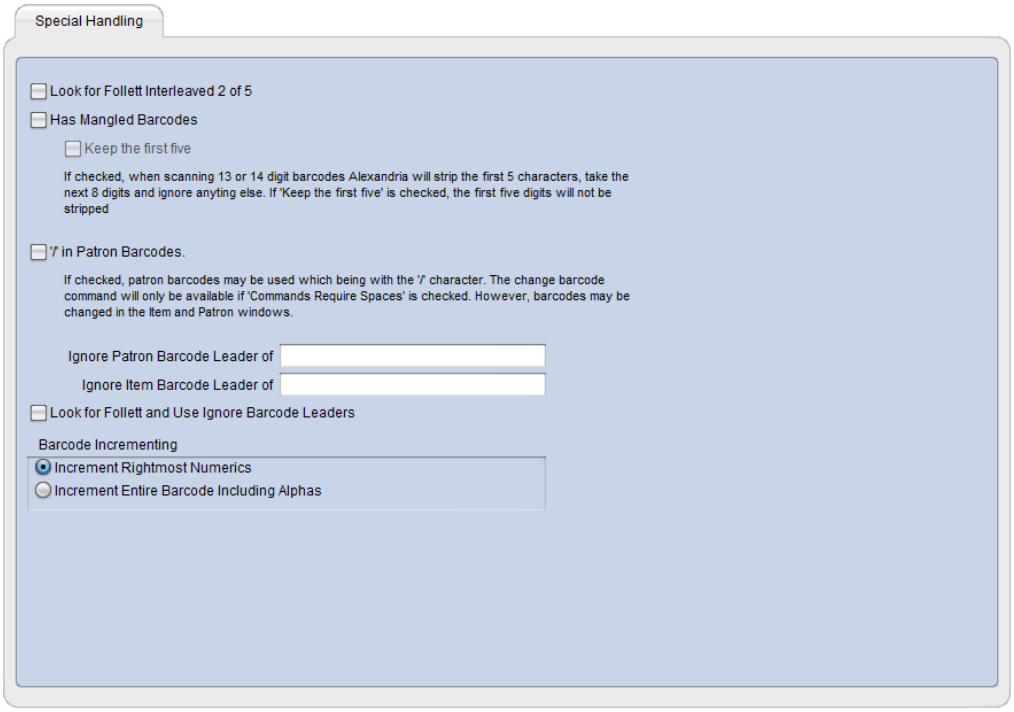
Step 6. Click on the **Barcodes** icon in the **Management** section of the **Site Preferences** window.

Step 7. Using the **Temporary Barcodes** tab, configure the preferences that deal with your library's temporary barcode scheme.

Step 8. Click on **Save** in the upper-right corner of the window.

System Preferences: Special Handling tab

Configure these additional preferences that deal with your library's barcode scheme.


Special Handling
Look for Follett Interleaved 2 of 5
Has Mangled Barcodes
Keep the first five
If checked, when scanning 13 or 14 digit barcodes Alexandria will strip the first 5 characters, take the next 8 digits and ignore anyting else. If 'Keep the first five' is checked, the first five digits will not be stripped
'/' in Patron Barcodes.
If checked, patron barcodes may be used which being with the '/' character. The change barcode command will only be available if 'Commands Require Spaces' is checked. However, barcodes may be changed in the Item and Patron windows.
Ignore Patron Barcode Leader of
Ignore Item Barcode Leader of
Look for Follett and Use Ignore Barcode Leaders
Barcode Incrementing
Increment Rightmost Numerics
Increment Entire Barcode Including Alphas

Special Handling Settings

Look for Follett Interleaved 2 of 5—If you have any items with Follett Interleaved 2 of 5 barcode labels, check this box. This setting looks for all barcodes that are exactly 10 digits long and removes the last three digits that Follett uses as check digits.

Has Mangled Barcodes—If checked, when scanning 13- or 14-digit barcodes, Alexandria will strip off the first 5 characters, take the next 8 digits and ignore any remaining characters. Checking this box activates the **Keep the first five** checkbox, which, if marked, ensures that the first five digits will *not* be stripped when using **Has Mangled Barcodes**. Default is `OFF` for both.

'/' in Patron Barcodes—If checked, patron barcodes that begin with the "**/**" character may be used. The **Change Barcode** circulation command will only be available if **Commands Require Spaces** *(see "System Preferences: Rules tab" on page 134)* is checked. However, barcodes may be changed in the **Items** and **Patrons** window.

Barcode Settings

Ignore Patron Barcode Leader of—If you are using patron barcode numbers not designed for Alexandria, you can have Alexandria automatically ignore leading characters. For example, if your patron barcodes have the text "PAT" in front of each barcode, enter "PAT" in this field. Alexandria will ignore the "PAT" at the beginning of each barcode label. If you don't require this feature, leave the field blank. Multiple leaders may be entered, but must be separated by commas (e.g. PAT, PRN, etc.).

Ignore Item Barcode Leader of—If you are using item barcode numbers not designed for Alexandria, you can specify that Alexandria automatically ignore leading characters. For example, your item barcodes may have the text "ITM" in front of each barcode, enter "ITM" in the **Ignore Barcode Leader** of field. Alexandria will ignore the "ITM" at the beginning of the barcode label. If you have no need of this feature, leave the field blank Multiple leaders may be entered, but must be separated by commas (e.g. ITM, ITE, etc).

Look for Follett and Use Ignore Barcode Leaders—Normally, if **Look for Follett Interleaved 2 of 5** is checked and there are barcode leaders to ignore, then only the Follett check is made. If this box is checked, then specified barcode leaders will still be removed from the beginning of the barcode after the Follett adjustment has been made.

Barcode Incrementing

Increment Rightmost Numerics—When this option is selected, new barcodes should only increment the rightmost numeric digits (even when using alphanumeric barcodes). In other words, when incrementing rightmost numerics, the barcode increments to the right and grows to the right. For example, the barcode following aaa999 should be aaa1000. This is the default setting.

Increment Entire Barcode Including Alphas—When this option is selected, new barcodes modify both alpha and numeric characters, increment to the right, and grow to the left. For example, the barcode following aaa999 would be aab000. The barcode zzz999 becomes 1aaa000, then 1aaa001, then 1aaa002, and so on and so forth; eventually becoming 1zzz999, which then turns to 2aaa000. Remember that, with this formula, (Z + 1 = 1A).

System Preferences: Hidden Options tab

If you need to enable/disable this tab, please contact COMPanion's Technical Support team.

Repair Trailing Alpha Check Digit—If this box is checked, items that *would* match a scanned barcode (if they had the exact same trailing alpha check digit) are repaired so that their barcodes match exactly.

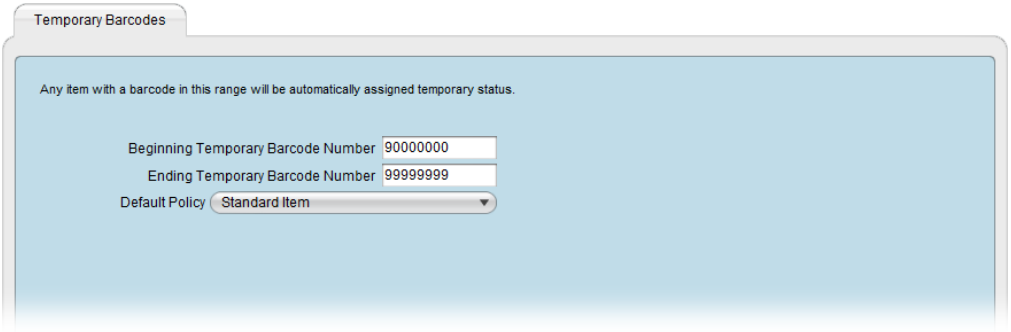
Repair Trailing Numeric Check Digit—When this box is checked, items that *would* match a scanned barcode (if they had the same trailing numeric check digit) are repaired so that their barcodes match exactly.

Ignore Leading Zeros on Barcodes—When checked, if barcodes begin with zeroes, those zeroes must be entered in the data if they are scannable barcodes.

Allow Spaces in Barcodes—If checked, scanned barcodes will be tested to see if they are barcodes before they are tested to see if they are commands.

Site Preferences: Temporary Barcodes tab

Set the preferences that deal with your library's temporary barcode scheme.



Beginning/Ending Temporary Barcode Number—Enter the first and last number of the barcode range that you want dedicated to temporary items. Alexandria will treat any barcodes entered within the **Beginning** / **Ending** range as a temporary item (if the number hasn't previously been assigned to a patron or item). Default is `90000000` to `99999999`.

Default Temporary Item Policy—Use this drop-down menu to select the default item policy that Alexandria uses when calculating due dates and fines on temporary items. See page 105 for more information on **Standard**/**System Item** policies. Default is **Standard Item**.

Cataloging Preferences

Step-by-Step: Cataloging Preferences

Use the **Cataloging System Preferences** to configure general information about your catalog headings, default medium pictures, and leading articles.

System Preferences

Step 1. Before continuing, please note that **Cataloging** preferences exist in both your **System** *and* **Site Preferences**. However, the **Policy Mapping** preferences that exist in the **Site Preferences** window are an advanced feature that most users won't have to immediately worry about and, therefore, is not covered as one of the "getting started" procedures.

Step 2. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 3. Click on the **Cataloging** icon in the **Management** section of the **System Preferences** window.

Step 4. COMPanion recommends that you leave *all* the default settings on the **Subject Sources** tab if your library is located within the United States.

Step 5. The **Cover Art** tab allows users to apply pictures to individual or default mediums by dragging and dropping their own custom `GIFs`, `BMPs`, `PNGs`, `PICs`, `JPGs` (or most standard image files).

Step 6. Use the **Leading Articles** tab to specify which leading articles (e.g. *the*, *an*, *a*) should be ignored during cataloguing and searching. Since leading articles vary from language to language, this preference gives an operator total control over how they are defined.

Step 7. Click on **Save** in the upper-right corner of the window.

Subject Sources tab

If your searches are not returning the results you'd expect (or not returning results at all), selecting the appropriate `650` (second indicator) subject headings will inform Alexandria which you would like to have cataloged. Since cataloging only occurs during an import or modification of records, changes made here will only be reflected in new records unless you rebuild your database. If you do not understand these settings, please talk to a qualified MLS librarian or MARC expert, call COMPanion's Technical Support team, or refer to "*650 - Subject Added Entry-Topical Term*" section of the Library of Congress website for more information about subject sources.

- NOTE-

COMPanion strongly recommends that you leave all of the default settings on the Subject Sources tab if your library is located within the United States.

Second Indicators

Catalog LC Subject Headings—When checked, subject headings are appropriate for use and conform to the *Library of Congress Subject Headings* (LCSH) and the Name authority files that are maintained by the Library of Congress[1] will be keyworded. Default is **ON**.

Catalog LC Juv Headings *(650 -0)***—**When checked, subject headings conform to the "AC Subject Headings" section of the Library of Congress Subject Headings and is appropriate for use in the LC Annotated Card Program. Default is **ON**.

Catalog National Library of Medicine Headings *(650 -1)***—**When checked, subject headings are appropriate for use and conform to the National Library of Medicine authority files. Default is **OFF**.

Catalog National Agricultural Library Headings *(650 -3)***—**When checked, subject headings are appropriate for use and conform to the National Agricultural Library subject authority files. Default is **OFF**.

Catalog Source Not Specified Headings—When checked, unspecified catalog source headings will be keyworded (i.e. operator-supplied subject headings). Default is **ON**.

Catalog Canadian Subject Headings *(650 -5)***—**When checked, subject headings are appropriate for use and conform to the *Canadian Subject Headings* that are maintained by the Library and Archives Canada. Default is **OFF**.

Catalog French Subject Headings *(650 -6)***—**When checked, subject headings conform to the *Répertoire de vedettes-matière* that is maintained by the Bibliothèque de l'Université Laval. Default is **OFF**.

Catalog Sears Headings *(650 -7)***—**When checked, subject headings conform to a set of subject heading system/thesaurus building rules. Default is **ON**.

Index 700_t as a Title—When checked, items with 700_t tags will be indexed as a title[2]. Default is **OFF**.

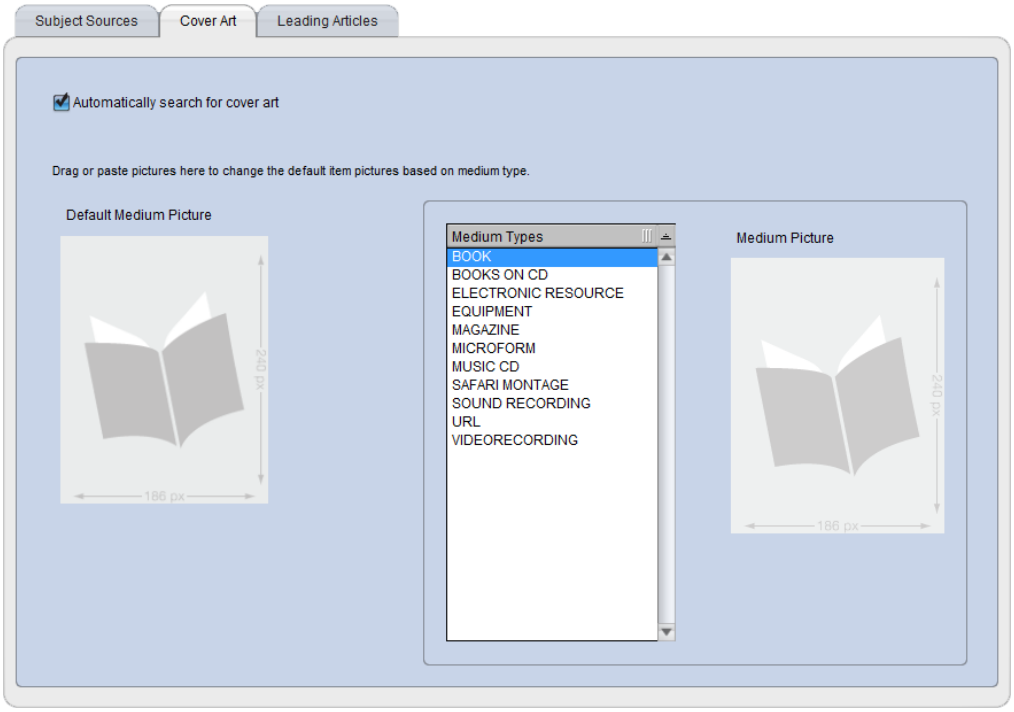
---

1. The Library of Congress Subject Headings (LCSH) system was originally designed as a controlled vocabulary for representing the subject and form of the books and serials in the Library of Congress collection, with the purpose of providing specified, subject search criteria to the bibliographic records contained in the Library of Congress catalogs. As an increasing number of other libraries have adopted the Library of Congress subject headings system, it has become a tool for subject indexing of library catalogs in general. In recent years, it has also been used as a tool in a number of online bibliographic databases outside of the Library of Congress (e.g. Alexandria). A subject heading may consist of one or more words. A one-word heading represents a single concept, whereas a multiple-word heading may represent a single concept or multiple concepts. A subject heading representing a single concept may appear as a single word or a multiple-word phrase, usually an adjectival phrase but occasionally a prepositional phrase. Each such heading represents a single object or idea (Examples include: Automobiles, Botany, Budget deficits, Electric interference, Boards of trade, Clerks of court).

2.Catalogers of music (which also parallels other subjects) have developed a distinctive approach to the MARC tagging. In particular, they (along with their colleagues in literature, fine arts, and theology) rely upon the 700_t field for uniform work titles and authority control.

Cover Art tab

The **Cover Art** tab allows users to apply pictures to individual or default mediums by dragging and dropping their own `GIFs`, `BMPs`, `PNGs`, `PICs`, `JPGs` (or most standard image files) onto the **Medium Picture** field. Once this is done, a new medium picture will be applied. Operators can reset to the default medium picture by left-clicking in the **Medium Picture** or **Default Picture** fields and selecting **Restore From Defaults**.



The **Default Picture** field is applied to every medium lacking an exclusive **Medium Picture** (e.g. in the case of a newly created medium).

The default **Medium Picture** will appear in place of the actual image every time a title doesn't have cover art individually applied to it; apply item artwork is usually done from within the **Items Management** window *(see "Item Management" on page 239)*.

Enabling the **Automatically search for cover art** service allows Alexandria to search the world wide web for cover art for any title (using the title's ISBN) in your collection that currently uses one of COMPanion's **Default Cover Art** images. On a daily basis, Alexandria creates a list of ISBNs for titles that lack unique, individual cover art images and then searches the internet for those images, one every ten seconds, until every title in the list has been regarded. This service will run in the background and requires no additional operator interaction.

Step-by-Step: Applying a New Medium Picture

Follow these steps to apply a new default medium picture:

Step 1. Select which medium's picture you would like to change from the **Medium Types** field on the left-hand side of the window.

Alternately, if you'd like to apply a **Default Picture** *to all* the mediums that currently lack one, follow the steps below.

Step 2. Drag and drop your new medium image on to the **Medium Picture** or **Default Picture** fields on the right-hand portion of the window.

Images can also be pasted into the **Medium Picture** or **Default Picture** field from your operating system standard clipboard.

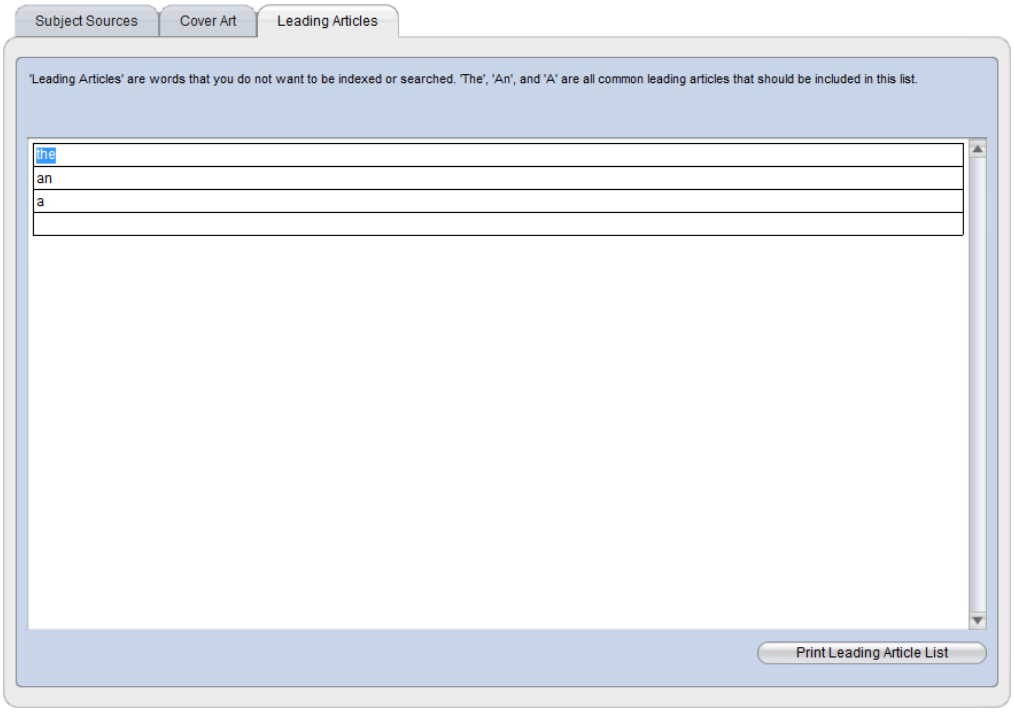
Step 3. Click **Save** to apply your changes or **Revert** to discard them.

NOTE:
The **Default Picture** will apply to *all* mediums that do not have an overriding **Medium Picture**.

Leading Articles tab

Leading articles are words such as *"the"*, *"an"*, *"a"* (or their equivalents in other languages) that appear at the beginning of a title or a series name. This preference tab allows you to specify which leading articles (e.g. *the"*, *"an"*, *"a"*) should be ignored during cataloging and searching. Since leading articles and punctuation vary from language to language, this preference gives an operator total control over how they are defined and how they affect searching and selections in various areas of Alexandria.

Use the **Print Leading Article List** button in the bottom-right corner of the window to print a list containing all the leading articles you've provided in the field (shown below).


Subject Sources
Cover Art
Leading Articles
'Leading Articles' are words that you do not want to be indexed or searched. 'The', 'An', and 'A' are all common leading articles that should be included in this list.
the
an
a
Print Leading Article List

Leading Articles Settings

Where is this preference used; what does this preference affect?

- Titles beginning with these leading articles will be sorted by the next available word. The second indicator of the **245** tag is automatically set to the correct MARC standard value for the skipped leading article.
- Series beginning with these leading articles are sorted by the next available word. The second indicator of the **830** tag is automatically set to the correct MARC standard value for the skipped leading article.
- When Alexandria searches for titles, queries that begin with a leading article will automatically have that term skipped. Thus, the query for *"The Cat in the Hat"* will actually search for *"Cat in the Hat"*.
- When searching for a series, queries beginning with a leading article will automatically have that term skipped. Thus, the query *"The Wizard of Oz"* will actually search for *"Wizard of Oz"*.

Rules Preferences

Step-by-Step: Circulation Rules

Before we start, please note that **Rules** preferences exist in both your **System** *and* **Site Preferences**; you may have to make adjustments in each area.

System Preferences

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Rules** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Click on the **Rules** tab; use this tab to set whether or not items may be renewed when there are holds are pending, whether or not to show the patron name in the reservations window and other reservations-related preferences.

Step 4. Set whether or not to charge late fees on lost or found books, etc.

Step 5. Set the **Transaction Log Save** frequency (we recommend **Daily**).

Step 6. For those using the Central Union system, click on the **In Transit** tab; use this tab to adjust the periods required.

Step 7. Click on **Save** in the upper-right corner of the window.

Site Preferences

Step 8. Now, select **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) from the main **Edit** menu bar.

Step 9. Click on the **Rules** icon in the **Circulation** section of the **Site Preferences** window.

Step 10. When the **Rules** preference window appears, click on the **User Interaction** tab.

Step 11. Decide whether or not you would like to display the **Patron Lexile** levels.

Step 12. The most important preference on this tab is the **Check Out Options**. COMPanion suggests that this be set to **Allow check in with confirmation during checkout**.

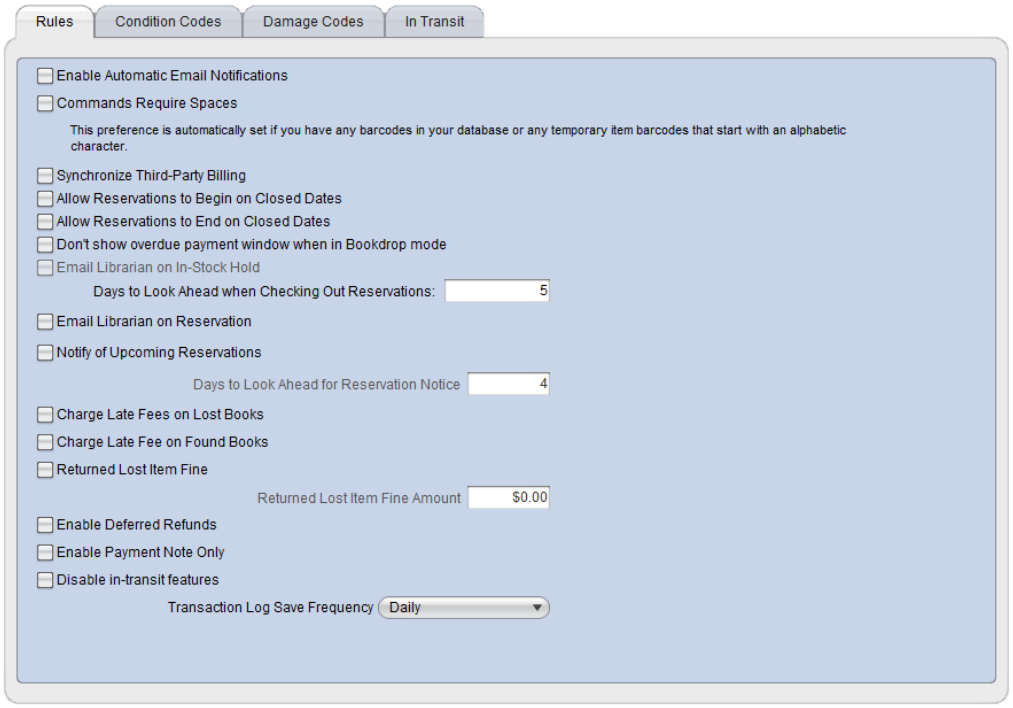
Step 13. Click on the **Receipts** preference tab; use this tab to configure when you want to automatically print receipts. Of course, you can always use the <D> command to manually print transaction receipts.

Step 14. Click on the **Letters** preference tab; use this tab to customize the messages in your letters (patron notices) sent from the library. This includes overdue notices, recall messages, etc.

Step 15. Click on **Save** in the upper-right corner of the window.

System Preferences: Rules tab

The **Rules** tab contains preference options for, among other things, holds and reservations settings.


Rules
Condition Codes
Damage Codes
In Transit
Enable Automatic Email Notifications
Commands Require Spaces
This preference is automatically set if you have any barcodes in your database or any temporary item barcodes that start with an alphabetic character.
Synchronize Third-Party Billing
Allow Reservations to Begin on Closed Dates
Allow Reservations to End on Closed Dates
Don't show overdue payment window when in Bookdrop mode
Email Librarian on In-Stock Hold
Days to Look Ahead when Checking Out Reservations: 5
Email Librarian on Reservation
Notify of Upcoming Reservations
Days to Look Ahead for Reservation Notice 4
Charge Late Fees on Lost Books
Charge Late Fee on Found Books
Returned Lost Item Fine
Returned Lost Item Fine Amount $0.00
Enable Deferred Refunds
Enable Payment Note Only
Disable in-transit features
Transaction Log Save Frequency Daily

Rules Settings

Enable Automatic Email Notifications—Check this box if you want Alexandria to automatically send email confirmations and notices to patrons. If selected, Alexandria will send email to patrons with valid email addresses when the following events occur: a hold is placed, a hold expires, an in-stock hold is available, an in-stock hold expires, item becomes overdue, and a recall is issued. To make this option available and to guarantee that your email notifications are being sent, you must have a valid **Library Email Address** (see **Site Management**; *page 51*), a valid patron email address (see **Patron Management**; *page 257*), text in your **Overdue Notice letter** field, and this **Enable Automatic Email Notifications** box checked.

Commands Require Spaces—Checking this box will require that all Alexandria **Circulation** window commands (or remote transaction import scripts) have spaces between the actual command and any additional command information. For example, if this box is checked, Alexandria won't be able to recognize the command `F4.50` (a charge of four dollars and fifty cents). However, if you enter `F 4.50`, with a space between the `F` and the `4`, then Alexandria will be able to process the command. This preference exists for schools who use barcodes that start with letters of the alphabet; that, in case they are imported, they are not misinterpreted as Alexandria commands. This preference will be automatically set if you have any barcodes in your database or any temporary item barcodes that start with an alphabetic character.

Synchronize Third-Party Billing—Check this box to synchronize your charges and refunds with a compatible third-party (i.e. not COMPanion) billing systems. For more information on the **Synchronize Third-Party Billing** preference, see the related sections in our Online Help.

Allow Reservations to Begin on Closed Dates—When checked, this option allows users to place reservations that begin on closed library dates.

Allow Reservations to End on Closed Dates—When checked, this option allows users to place reservations that end on closed library dates.

Don't Show Overdue Payment Window When In Bookdrop Mode—When checked, a patron will be automatically fined when an overdue book is dropped.

Email Librarian on In-Stock Hold—When checked, Alexandria will email the librarian(s) when an item status changes to **In-Stock Hold**.

Days to Look Ahead When Checking Out Reservations—This sets the number of calendar days that Alexandria looks ahead for reservations when items are checked in. During check in, if a reservation is detected within this specified time period, Alexandria will alert the operator. The "GG" and "GPP" circulation commands also take this date into account before checking reservation items out to patrons. Default is set to 5 days.

Email Librarian on Reservation—When checked, Alexandria will email the administrators when a **Reservation** is placed on an item.

Notify of Upcoming Reservations—Send email notification to patrons with upcoming reservations.

Days to Look Ahead for Reservation Notice—This sets the number of calendar days that Alexandria looks ahead before sending out upcoming reservation email notices. Default is set to 4 days.

Charge Late Fees on Lost Books—If this box is checked, then late fees continue to accumulate on lost books up to the max fee limit set by that item's **Items** policy preference. To stop charging fees on a particular item, **Remove** the copy or assign it as **Discarded**.

Charge Late Fees on Found Books—If this box is checked, when a lost item has been located, the patron who last had the book is charged an overdue fine for the period between when the item was lost and when it was found (up to the **Maximum fine for an overdue item**). Also, when this box is checked, the **Refund Lost Item Payment, Charge Overdue Fine** window appears when a lost item with an overdue fine is found.

Returned Lost Item Fine—Amount (fine) to withhold when refunding the fine for a lost item that has been found.

Returned Lost Item Fine Amount—Amount (fine) to withhold when refunding the fine for a lost item that has been found.

Enable Deferred Refunds—If this box is checked, when lost items (for which patrons have paid fines) are located, there will be an option in the subsequent **Refund Payment** window to defer payment of the refund by creating a credit.

Enable Payment Note Only—If this option is checked, when a lost item is checked in and there is a payment due or refund due and the current Alexandria operator does not have payment or refund permissions, they will be allowed to enter a note.

Disable In-Transit Features—When this box is checked, **In-Transit** features are disabled in Textbook Tracker. If this box is checked, the only In-Transit related operation that can be performed is **Bookdrop**.

Transaction Log Save Frequency—Select **Daily**, **Weekly**, **Monthly** or **Never**. Archived logs are placed in the **Log** folder, which is located in Alexandria's shared application support folder *(see page 8 for more information)*. Default is **Weekly**.

The transaction log will contain everything that is displayed in the **Circulation** window, and any additional special notes that may be useful. Every Alexandria machine will keep a transaction log that contains a history of everything that has occurred. It can be a valuable document if you want to examine any Workstation's history.

The following choices are available:

Daily—The transaction log is archived at the beginning of each day and is placed in the **Log** folder with a name such as **Circ Log for day 20120120** (**yyyymmdd**).

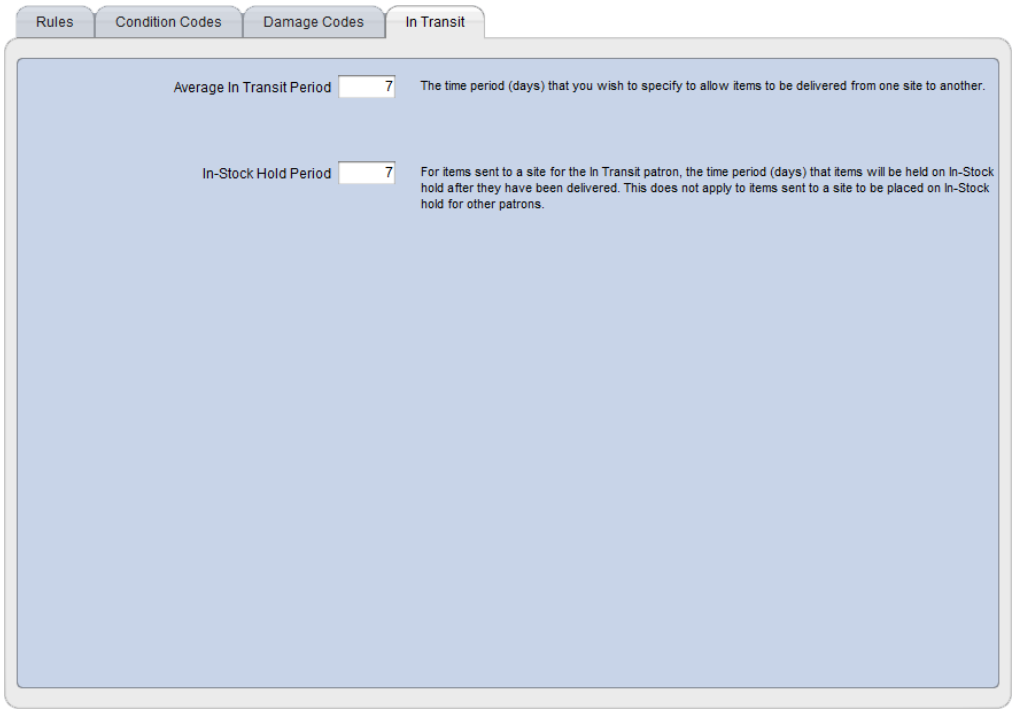
Weekly—The transaction log is archived every week (a week starts on Monday) and is placed in the **Log** folder with a name such as **Circ Log for week 20120120** (**yyyymmdd**).

Monthly—The transaction log is archived at the beginning of every month and is placed in the **Log** folder with a name such as **Circ Log for month 201201** (**yyyymm**).

Never—The transaction log is saved, but never archived. Under this option, the transaction log can grow to be very large; this can cause difficulty when attempting to search for a specific transaction.

System Preferences: In Transit tab

For those in a **Central Union** environment, the **In Transit** system preferences are used to set the default time periods (in days) to allow for items "in transit" or "in-stock" before showing up in the **In Transit - Late In Arriving** report.


Rules
Condition Codes
Damage Codes
In Transit
Average In Transit Period
7
The time period (days) that you wish to specify to allow items to be delivered from one site to another.
In-Stock Hold Period
7
For items sent to a site for the In Transit patron, the time period (days) that items will be held on In-Stock hold after they have been delivered. This does not apply to items sent to a site to be placed on In-Stock hold for other patrons.

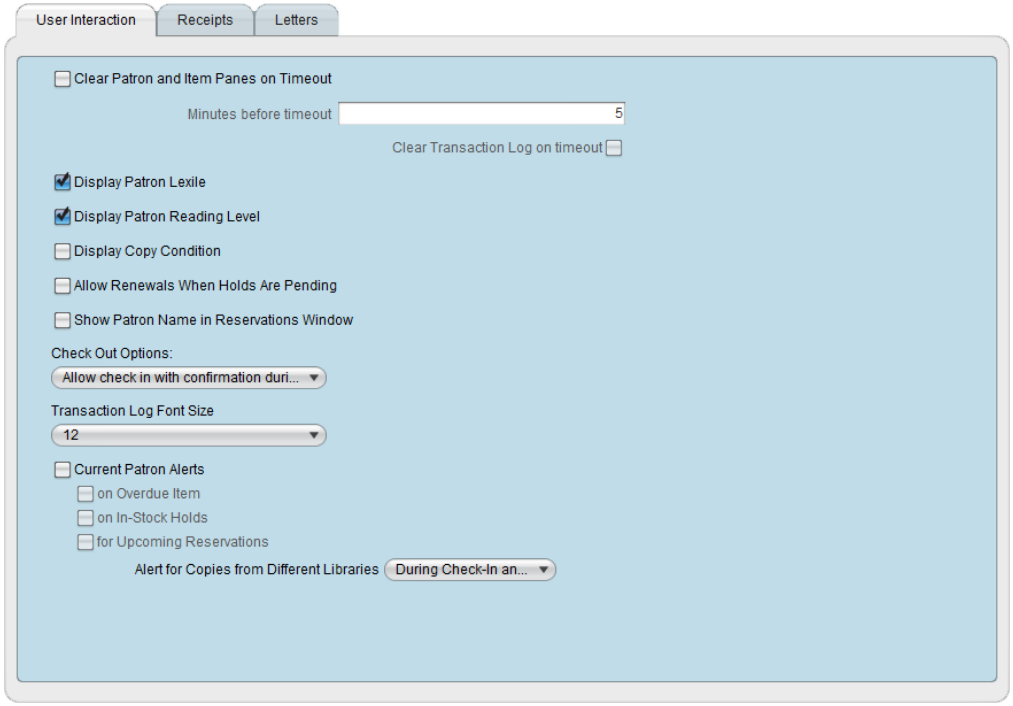
In Transit Settings

Average In Transit Period—Use this field to set the time period (in days) that you wish to allow items to be delivered from one school to another. Default is 7.

In-Stock Hold Period—This is the time period (in days) that items will be held on **In-Stock Hold** for the **In Transit** patron after they have been delivered to your site; it does *not* apply to items sent to a school to be placed on **In-Stock Hold** for other patrons. Default is 7.

Site Preferences: User Interaction tab

One of the most important preferences on the **User Interaction** tab is the **Check Out Options** setting; COMPanion suggests that this be configured to **Allow check in with confirmation during checkout**. Also, if you're an Alexandria user, determine whether or not you would like to display **Patron Lexile** levels.



User Interaction Settings

Clear Current Patron and Item on Timeout—When this box is checked, it will clear the current patron/item from the main **Circulation** window depending on what you have set in the **Minutes Before Timeout** field.

Minutes Before Timeout—This field will appear grayed out unless you have **Clear Current Patron/Item on Timeout** checked. Provide the amount of time (in minutes) to wait before Alexandria clears the current patron/item from the main **Circulation** window.

Clear Transaction Log on Timeout—This checkbox will appear grayed out unless you have **Clear Current Patron/Item on Timeout** checked. When this box is checked, the **Transaction Log** will also be cleared when the current patron/item is cleared.

Display Patron Lexile—When this box is checked, it will display a patron's Lexile measurement in the current patron section of the **Circulation** window, Researcher Workstation, and anywhere else lexiles are displayed *(for more information, please review the "Lexiles" section of Alexandria's Online Help)*.

Display Patron Reading Level—When this box is checked, it will display a patron's reading level in the current patron section of the **Circulation** window, Researcher Workstation, and wherever else reading level measurements are displayed *(for more information, please review the "Reading Level" section of Alexandria's Online Help)*.

Display Copy Condition—When this box is checked, it will display the copy's condition in the current item section of the **Circulation** window, Researcher Workstation, etcetera *(for more information, please review the "Copy Condition section of Alexandria's Online Help).*

Check Out Options—This drop-down menu allows users to change the functionality of Alexandria's **Check In/Out** mode. When **Allow check in with confirmation during check out** is selected, Alexandria will not allow a book to be checked in during **Check In/Out** mode without user confirmation. When set to **Don't allow check in during check out**, Alexandria won't allow any items to be checked in. However, this setting only applies when the current patron has already checked the item out and processing the same barcode would check it back in; it does *not* apply when another patron has the item checked out. Default is **Allow check in during check out**.

Allow check in during check out—If Alexandria is in **Check Out** mode, this option allows items to be checked-in or bookdropped using the **Circulation** window.

Allow check in with confirmation during check out—If you try to check in an item (or items) while the **Circulation** window is in **Check Out** mode, Alexandria will require verification (if you wish to check in or renew) before checking-in or renewing the item(s).

Don't allow check in during check out—This selection will not allow items to be checked in while Alexandria's **Circulation** window is in the **Check Out** mode. For example, your library may require separate Librarian Workstations, some that only allow items to be checked in and others that only allow items to be checked out.

Transaction Log Font Size—Use this drop-down menu to set how large (or how small) you would like the text to appear in the **Circulation** window's **Transaction Log**. You may choose from **18**, **16**, **14**, **12**, or **10** point size. Default is **12**.

Current Patron Alerts—When this preference is checked, it will emit an alarm sound when a patron is made current and has fines, overdue items, in-stock holds, upcoming reservations, or other special cases. Mark the boxes beneath this preference to indicate which events will trigger an alert sound.

on Overdue Item—Send notification emails to patrons with overdue items.

on In-Stock Holds—Send notification emails to patrons with in-stock holds.

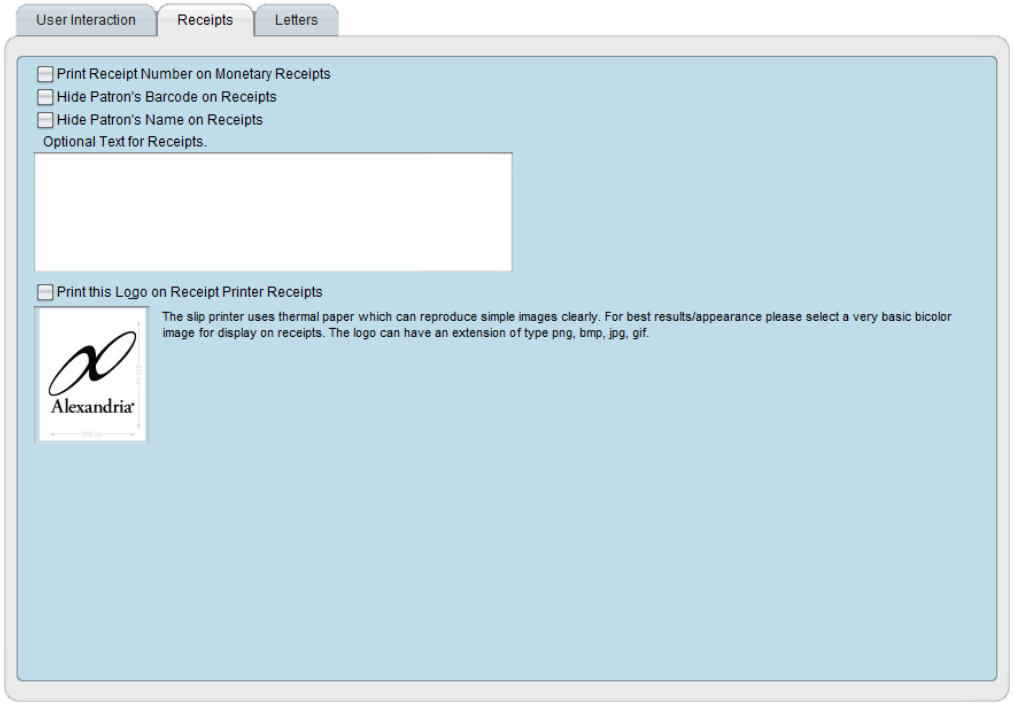
for Upcoming Reservations—Send notification emails to patrons with upcoming reservations.

Alert for Copies from Different Libraries—If checked, a warning message will appear when copies from different libraries are checked in or inventoried.

Site Preferences: Receipts tab

Receipt printing is best done with COMPanion slip printers; they provide a convenient and economical means of printing receipts for common circulation transactions such as check-outs, placed holds, fines, fees, payments, and refunds. If you are interested in licensing use of COMPanion's slip printer component, contact your sales representative at *(800) 347-6439* and ask about part **V4007**. If you have already licensed use of COMPanion's receipt printer component for Alexandria or Textbook Tracker and need further information or assistance with setup, operation, and maintenance, please call COMPanion Technical Support at *(800) 347-4942* or email *support@companioncorp.com*.

Use the **Receipts** tab to configure when you want to have receipts automatically printed. Of course, you can always use the "D" or "QP" command to print transaction receipts.


User Interaction
Receipts
Letters
Print Receipt Number on Monetary Receipts
Hide Patron's Barcode on Receipts
Hide Patron's Name on Receipts
Optional Text for Receipts.
Print this Logo on Receipt Printer Receipts
The slip printer uses thermal paper which can reproduce simple images clearly. For best results/appearance please select a very basic bicolor image for display on receipts. The logo can have an extension of type png, bmp, jpg, gif.
Alexandria

Receipts Settings

Print receipt number on monetary receipts—If this box is checked, then a receipt number will be printed on monetary receipts.

Hide Patron's Barcode on Receipts—Obscures a patron's barcode with asterisks (e.g. " * ") for check in/out receipts.

Hide Patron's Name on Receipts—If this box is checked, it will show a patron's initials instead of their full name.

***Optional additional text for slip printer receipts—**This is a user-defined text header that appears before the general header (or after the patron name on in-stock hold receipts). This header will be centered horizontally and can be as many lines as are required by the user. This field is most often used to house the name and address of your school or library.

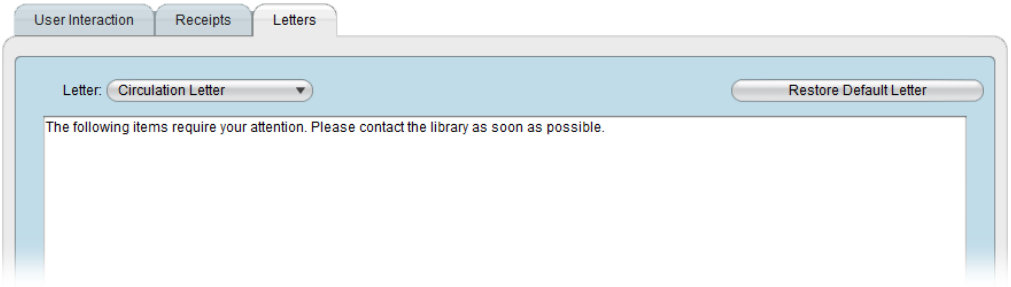
This is an optional feature of Alexandria; you must be purchase a **Slip Printer** registration license in order for this preference to appear.

***Print this logo on slip printer receipts—**The slip printer uses thermal paper which can reproduce simple images clearly. For the best results, please select a very basic bi-color image for display on receipts; a black and white image with a simple, line-oriented design is preferred. The logo must be in a `PNG`, `BMP`, `JPG` or `GIF` image format (preferably *`.jpg`*) and, for optimal quality, have a dimension *no larger* than 200 pixels wide by 250 pixels high. Please review the sample slip printer logo in the margins.

This is an optional feature of Alexandria; you must be purchase a **Slip Printer** registration license in order for this preference to appear.

Site Preferences: Letters tab

Use the **Letters** tab to customize the messages in the letters (patron notices) that are sent from your library. This includes overdue notices, recall messages, etc. Use the **Letter** drop-down menu to choose the notice to edit. Use the **Restore Default Letter** button, located in the upper-right corner of the tab, to replace your custom text with our system default text. Be aware, however, that the **Restore Default Letter** button will restore *all* of your letters to their default value at once.



Step by Step: Customizing Letters & Notices

To replace or modify the body copy of a text notification/letter:

Step 1. Select **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) from the main **Edit** menu bar.

Step 2. Click on the **Rules** icon in the **Circulation** section of the **Site Preferences** window.

Step 3. Click on the **Letters** tab.

Step 4. Select the notice to be changed using the **Letter** drop-down menu.

Step 5. Select (or highlight) the text to be modified and press <delete>.

Step 6. Replace, modify, or enter the desired text.

Step 7. Click on **Save** to keep your changes or **Revert** to discard them.

Step 8. The default body copy text can be restored to all messages using the **Restore Default Letter** button; however, operators must realize that the restoration is for *all* letter types, not just one.

Researcher Preferences

First, an introduction to the Researcher Workstation!

The Researcher Workstation is an exquisitely robust, visually engaging, and genuinely intuitive library search interface that appeals to both children and grown-ups alike. Both patrons and operators are able to search authorized collections over the world wide web.

Generally, the Researcher Workstation is opened using your Librarian Workstation's default web browser when selecting **Researcher** from the main Alexandria **Show** drop-down menu. Otherwise, patrons can use the Researcher to search library collections around the world wide web by entering the IP address of your Alexandria Data Station in the "URL" or "address" field of their favorite internet browser.

Both patrons and operators are able to search local collections or authorized remote locations over a wide area network; access to wide area network locations requires an **Alexandria WAN** license and must be configured in your Data Station's System Preferences.

Some features of the Researcher include:

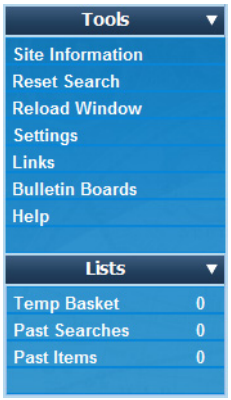
- A single word performs an immediate search; on-the-fly toggling between simple and advanced searches.
- Clickable icons emphasize your **Most Popular** (highly circulated titles), **What's New?** (recent additions), and **Award Winners** (books of prestigious accolade).
- Multiple views for search results; virtually browse your shelves, cover by cover, without leaving the comfort of your chair; smoothly scroll through the very first call number to the last.
- Using pre- and post-**Filters**, you can refine your search results by limiting your fields to "author", "series", "medium", and more.
- Comprehensive title details provide ease of access to important information including, but not limited to, Lexiles, Study Programs, Point Counts, Interest and Reading Levels information, digital media, operator-approved websites, eBooks, and other uncommon resources.
- Save titles for later by dragging and dropping them into default or patron-created **Saved Lists** that allow patrons a virtual place to store lists of items they'd like to check out in the near or distant future.
- A supervised review system that allows patrons to publish and share their opinions while allowing library administrators to oversee and manage content.

How Do I Open the Alexandria Researcher?

You can access Alexandria's Researcher Workstation in a multitude of ways.

- Select **Researcher** from Alexandria's main **Show** menu.
- Double-click on the "*To access the Researcher*" link near the top of Alexandria's **Transaction Log**.
- In the **Web Settings** subtab of the **Site Information** system preferences, click on the blue **To access Web Researcher** link.
- In the supported browser of your choice, provide the web address of your Researcher in the address bar and press <Enter>.
- In a **Central Union** environment, operators can create bookmarks (or links) to search specific schools without having to rely on cookies set at individual Researcher Workstations; this is done by including the **Institution** (otherwise known as **Site**) ID code in the web address. For example, if the COMPanion Middle School has an **Institution** (i.e. **School** for patrons and **Copy Site** for items) site code of *CompMS*, you would enter the URL as: *http://Researcher IP Address:port/#site=CompMS*. Be sure to mind the case-sensitivity of the **Institution** site code.

Researcher Overview

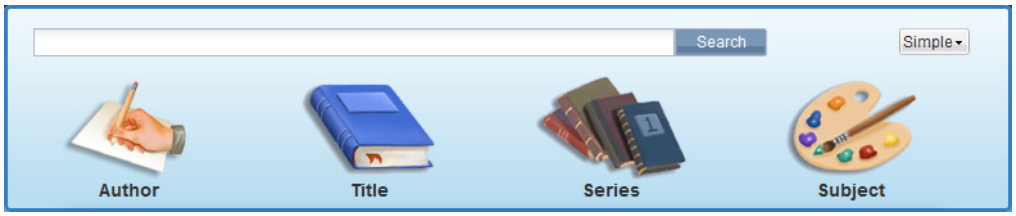


The main **Researcher** Workstation window can be divided into several distinct sections.

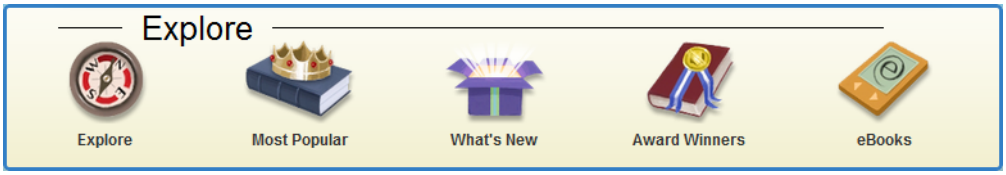
At the top of the window is a blue header bar that stretches from left to right.

The left-hand side of the window (shown on the right) contains the **Tools** and **Lists** selection menus and eventual post-search **Result Filters**.

At the outset, the larger, secondary section of the window is composed of a series of different **Search** options, filters, and panes; these include, but are not limited to the **Simple** and **Advanced** search, the **Explore** and **Extras** panes (which include **netTrekker**, **Capstone Interactive**, and **SearchAll**).



- The **Simple** search is for those who don't have strong reading or writing skills. Enter a search term and then click an optional picture icon to perform the search (e.g. **Author**, **Title**, **Series**, or **Subject**).
- The **Advanced** search allows patrons to choose the search type (e.g. **All Words**, **Authors**, or **Titles**) using drop-down menus, enter a search term, and then use Boolean operators to refine their search. Experienced users will typically use the **Advanced** interface for all of their searches.
- The **Study Program** interface is useful for those who want to look for titles belonging to a particular reading group or interest level. Enter a keyword, even if it's only the first few letters, click on the **Search** button, then select the terms you want from the results list.
- The **Explore** section (shown below) of the Researcher window consists of a completely iconic interface that provides shortcuts to popular searches (**Most Popular**, **What's New**, **Award Winners**, etc.) and can be customized by the librarian for quick access to specific library resources. Of the five default icons, **Explore** is the only one that leads to another set of icons.



However, once a search has been performed, the main window adjusts to provide the results of your latest search in variety of configurable views along with a series of breadcrumbs or an explanation of why no search results were returned.

For more information on how to use the Researcher Workstation, including exhaustive documentation about its many features and attributes, please consult the "Researcher Workstation" section of Alexandria's On-Line Help.

Step-by-Step: Setting Researcher Preferences

Researcher preferences are used to establish the ways in which the Researcher Workstation (RWS) client functions. These preferences are only necessary if you are planning on using the Researcher Workstation with your library.

Before continuing, please note that **Researcher** preferences exist in both your **System** *and* **Site Preferences**; you may have to make adjustments in each area.e to make adjustments in each area.

System Preferences

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the main **Edit** menu bar.

Step 2. Click on the **Researcher** icon in the **Management** section of the **System Preferences** window.

Step 3. Click on the **Rules** tab; this tab dictates what patrons are allowed to do on the Researcher Workstation.

Step 4. Check or uncheck the boxes to define the privileges allowed to patrons when they access the Alexandria Researcher. Make your choices thoughtfully to prevent any problems that may arise when patrons attempt to do things for which they are not allowed.

Step 5. COMPanion suggests that you only check **Require Login for Researcher** if you want viewing access limited to just your patrons.

Step 6. Using the **Researcher Workstation Timeout** drop-down menu, choose how long it takes for the Researcher to clear the information on the window and reset for a new search.

Step 7. Click on **Save** in the upper-right corner of the window.

Site Preferences

Step 8. Now, select **Site Preferences** (Opt+Cmnd+; / Ctrl+Alt+;) from the main **Edit** menu bar.

Step 9. Click on the **Researcher** icon in the **Management** section of the **Site Preferences** window.

Step 10. Click on the **Interface** tab.

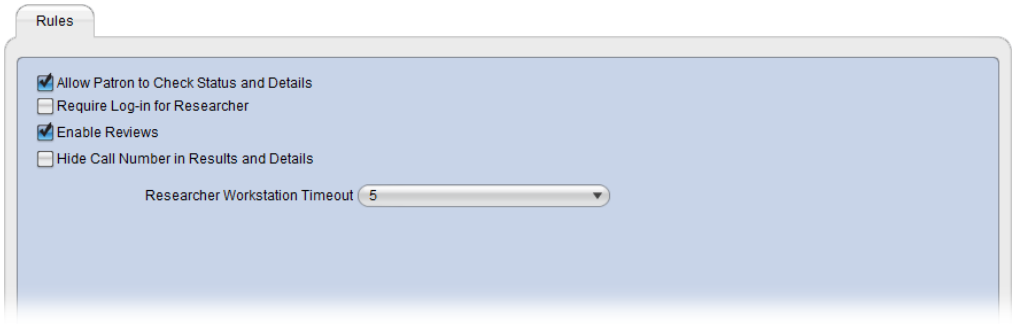
Step 11. Check or uncheck boxes to configure the interface (i.e. the drop-down menus and options available to patrons when they access the Researcher). For example, checking the **Sounds Like Prompt** box will activate the **Sounds Like** search so that if a patron types "gost" and no search results are found, the patron will be asked if a **Sounds Like** search should be performed and, if it is, it will find all records with the word "ghost."

Step 12. If you wish availability to be limited to what is in your library, then check the **Only Show Results For My Site** box.

Step 13. When you are finished, click on **Save** in the upper-right corner of the window.

System Preferences: Rules tab

The **Rules** tab determines what general circulation actions patrons are allowed to perform from a Researcher Workstation.



- NOTE -
These settings require that the patron first log in to the Researcher Workstation using their patron barcode number and password.

Allow Patron to Check Status and Patron Details—This checkbox allows a patron to view their status from a Researcher Workstation, including information about what items they have checked out, have on hold, or reserved. If this setting is enabled, patrons also have the ability to change their own passwords.

Require Login for Researcher—If checked, access to the Researcher require sa patron barcode and password. When unchecked, every internet user in the world has the ability to peruse your catalog collection via your Data Station's IP address.

Enable Reviews—Checking this box allows patrons to create and read title reviews. Although you can activate this feature here, appraising and approving reviews can only be done through Alexandria's Web Librarian *(for more information on "Reviews", please consult Alexandria's Online Help)*!

Hide Call Number in Results and Details—When checked, call numbers are hidden in the Researcher Workstation's **Results** and item **Details** pages.

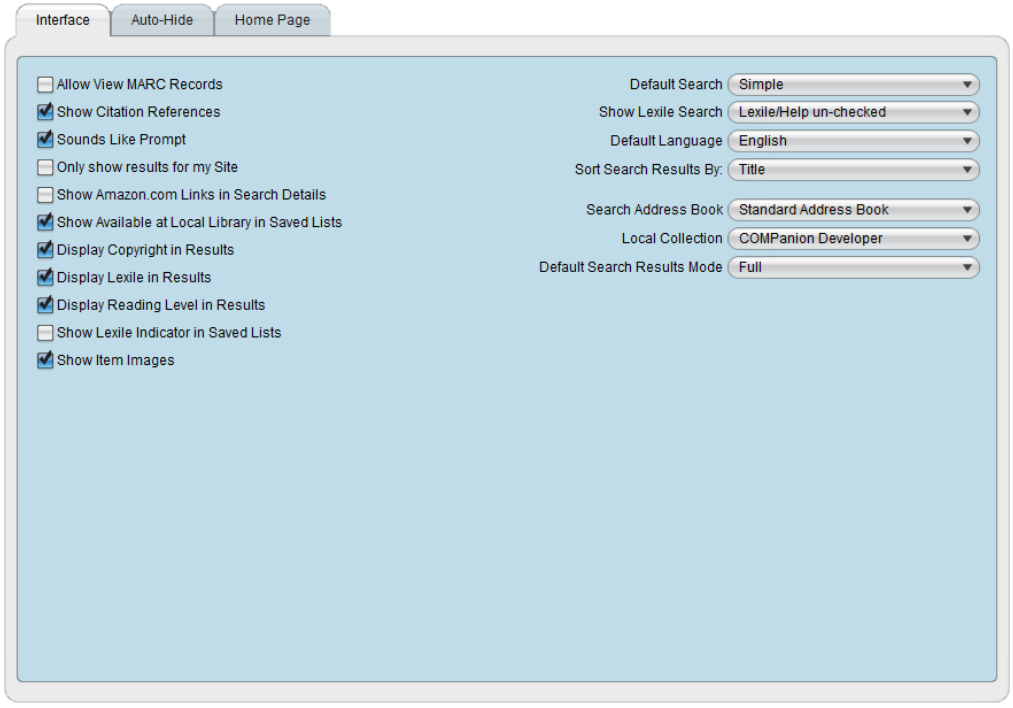
Researcher Workstation Timeout—You can select the number of minutes it takes for the Researcher Workstation to time out. If a patron walks away from the workstation, the Researcher will preserve their activities until this counter runs out and resets the window to its initial state. The default setting is **Three Minutes**.

Thirty seconds before resetting, a warning window will appear, allowing the patron to cancel the reset. If the patron fails to respond, the reset will occur as scheduled. If the patron cancels the reset, the timer is restarted.

If you do not wish the Researcher Workstation to reset when idle, select **Never** from this drop-down menu.

Site Preferences: Interface tab

Use these preferences to customize your Researcher Workstation; these preferences will be used as default for every Researcher Workstation that connects to your Data Station.


Interface
Auto-Hide
Home Page
Allow View MARC Records
Show Citation References
Sounds Like Prompt
Only show results for my Site
Show Amazon.com Links in Search Details
Show Available at Local Library in Saved Lists
Display Copyright in Results
Display Lexile in Results
Display Reading Level in Results
Show Lexile Indicator in Saved Lists
Show Item Images
Default Search Simple
Show Lexile Search Lexile/Help un-checked
Default Language English
Sort Search Results By: Title
Search Address Book Standard Address Book
Local Collection COMPanion Developer
Default Search Results Mode Full

Interface Settings

Allow View MARC Records—When unchecked, the **View MARC Record** hyperlink that appears on the bottom of an item's details window is disabled.

Show Citation References—Shows citation references for creating quick bibliographies.

Sounds Like Prompt—Check this box if you want a window to appear when a search finds no matches. The window will remind the patron of the **Sounds Like** search, which sometimes finds matches when other searches do not.

Only Show Results From My Site—If this box is checked, the Researcher will only show available copies that have a matching site ID code.

Show Amazon.com Links in Search Details—Choose whether or not to display links to **Amazon.com** at the bottom of the Researcher **Details** window. If a search is successfully performed, clicking on the hyperlinked graphic (shown to the right) will open `Amazon.com` in your default web browser with the closest possible match.

Show Available at Local Library in Saved Lists—If this box is checked, then the simple print option for saved lists in the Researcher will include a symbol that denotes if an item is available at a local library.

Display Copyright in Results—When this box is checked, the Researcher will include an item's copyright information (if available) in the search results window.

Display Lexile in Results—When this box is checked, the Researcher will include an item's Lexile information (if available) in the search results window.

Display Reading Level in Results—When this box is checked, the Researcher will include an item's reading level information (if available) in the search results window.

Show Lexile Indicator in Saved Lists—If this box is checked, an indicator will appear next to each title in a Saved List, showing whether it is above, equal to, or below, the current patron's Lexile.

Show Item Images—When this box is checked, an item's cover art will always be shown in the Researcher window; if the item doesn't have its own image, Alexandria's default medium image *(see "Cover Art tab" on page 130)* will be used. If this box is *not* checked, then item cover art will *never* be shown in the search results or details windows.

Default Search—Allows you to set the default search mode that the Researcher uses; you can choose between **Simple** (default), **Advanced** (Boolean), and **Study Program**. For more information on these search types, review the Researcher Workstation section.

Show Lexile Search—Use this drop-down menu to determine whether you'd like to show Lexile search information:

> **Lexile/Help un-checked—**Allows patrons to use the **Help Me Find a Book** feature, but defaults it to "unchecked".
>
> **Lexile/Help checked—**Allows patrons to use the **Help Me Find a Book** feature, but defaults it to "checked".
>
> **Hide Lexile/Help—**Make this selection if you do not wish to use the **Help Me Find a Book** feature; those who don't use Lexiles may not want this feature to appear available—that way, it will not confuse their patrons.

Default Language—This setting allows you to choose the default language used when the Researcher Workstation starts up or is reset. The default is set by your activation code; in the United States, it's set to **English**.

Sort Search Results By—This drop-down menu allows you to set the default *search results* order for the Researcher Workstation. You can choose between **Title**, **Author**, and **Call Number**.

Search Address Book—This drop-down menu allows you to select the default *address book* that will be used for a Researcher Workstation. The default selection is always the **Standard Address Book**.

Default Search Results Mode—Allows you to select the default search results mode that appears after a search has been successfully performed; you can choose between **Brief**, **Full** (default), and **Cover Art** *(for more information, please review the "Researcher Workstation" section of Alexandria's Online Help)*.

Notes:

Email Preferences

Step-by-Step: Configuring Email

Step 1. Select **Edit** from the menu bar, followed by **System Preferences** (Cmnd/Ctrl+;).

Step 2. From the **System Preferences** window, click on the **Email** icon in the **Network Services** section.

Step 3. To successfully use external SMTP, you must provide both a valid **Site Email Address** *(see "Site Settings" on page 57 for more information)* and a valid **Email** address for one of your District Administrator operators *(see "Patron Management" on page 257)*.

Step 4. Supply your **SMTP Server** information, **Port**, and, if **Use Authentication** is needed, check that box and provide your **Log In** and **Password**. Also check **Use SSL** if needed.

Step 5. Click **Save** in the upper-right corner of the window.

Email Rules and Basics

The way our email system was designed and configured is not quite like that of a personal email client—which rarely sends out more than a few emails at a time; it was designed to potentially cope with *hundreds* of emails (e.g. generated reports or patron notification) being sent (or resent) over *many* machines at the same time. Our email throttling defaults are quite effective at spreading out and resending dozens of undeliverable emails without interfering with the sends of those that *are* deliverable.

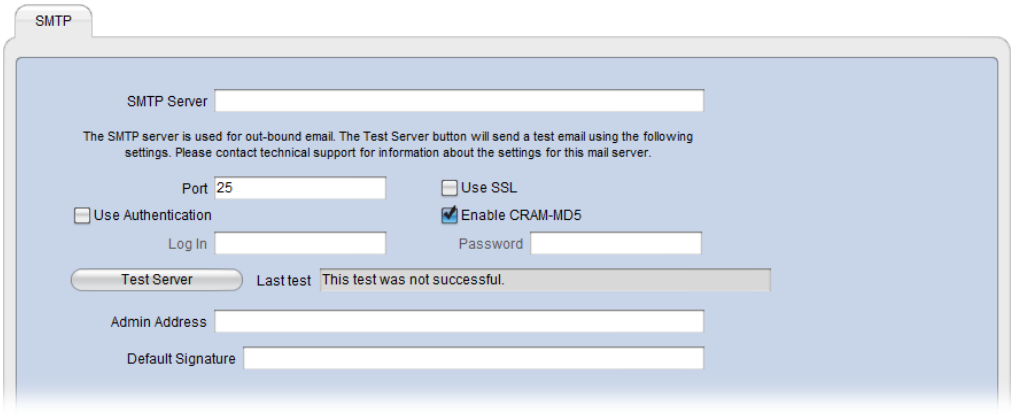
If a send fails, the next resend time is generated by adding a random value between *3* and *9* minutes, spreading out the resend times so all the undelivered email still in the "short range" period isn't sent at the same time. If a send hasn't succeeded by the end of the "short range" period, the program will generate new send times using random values between *60* and *90* minutes. This is useful because, in most cases, an undeliverable email can usually be delivered a few minutes later; on the flip side, if an email isn't delivered within the first hour, it might take several hours (or even days) to be successfully delivered. If it still hasn't succeeded after *100* hours (generally referred to as the "give-up" time by the RFC[1]), the email is discarded and a "return-to-sender" email will be sent.

Generally, these default ("short" and "long range") values do a good job of handling scheduled email traffic and throttling resends for sites that have an abundance of undeliverable email; however, if you have an installation that behaves in an unusual way, you might do better with different values. If you are having issues sending (or resending) email and believe that changing some of the "short" and "long range" values may be the solution, please contact COMPanion's technical support team and ask how to access and modify these hidden configuration options (1-800-347-4942 or *support@companioncorp.com*).

1.RFC is short for Request for Comments, typically an IETF (Internet Engineering Task Force) memorandum describing methods, behaviors, standards and protocols, research, or innovations applicable to the working of the Internet and Internet-connected systems.

SMTP tab

Use the **SMTP** tab to configure how Alexandria communicates with your library's email server. This is required if you intend to email letters and notices from within Alexandria. We recommend that you seek assistance from your IT staff when configuring SMTP information.


SMTP
SMTP Server
The SMTP server is used for out-bound email. The Test Server button will send a test email using the following settings. Please contact technical support for information about the settings for this mail server.
Port 25
Use SSL
Use Authentication
Enable CRAM-MD5
Log In
Password
Test Server
Last test
This test was not successful.
Admin Address
Default Signature

SMTP Settings

The **SMTP Server** and **SMTP Server 2** sections are used for out-bound email. The **Test Server** button will send a test email using your provided SMTP settings. Please contact COMPanion's Technical Support if you have additional questions about setting up your mail server.

SMTP Server 1 and **2**—This is the TCP/IP or DNS address of your library's mail server. Typically, this will be "`mail.`" followed by your domain name. You must enter a valid **SMTP Server** address to use email services.

Port—Supply the port number that your email server uses.

Use SSL—Check this box to use **S**ecure **S**ockets **L**ayer security protocols.

Enable CRAM-MD5—Uncheck this box only if you want to prevent the email service from using the CRAM-MD5 authentication method, quite often supported by *SMTP-AUTH Mail submission agents*. If present, this setting applies to the secondary server as well.

Use Authentication—Check this box to use authentication with this SMTP server. Checking this box will make the **Log In** and **Password** fields editable.

Log In—Enter the login (user identification) for the email server.

Password—Enter the password for the email server.

Test Server—Test the **SMTP Server** settings by sending a test email.

Last Test—This field displays the last date/time that the server test was performed and whether the test was successful or not.

Administrator Address—Supply the email address of the administrator responsible for the SMTP server. If you provide a list of addresses separated by comma ("`,`"), the first address in the list will be used as the "from-address" when required; otherwise, when used as the "to-address", emails generated by Alexandria will be sent to every address provided.

Default Signature—This optional email signature will be attached to the end of every email.

Step-by-Step: Setting Up Your SMTP Server

These step-by-step sections are intended for new or first time operators who need to know which basic and/or rudimentary preferences to set.

Step 1. Go to **Edit** on the main menu bar and select **System Preferences** (Cmnd/Ctrl+;).

Step 2. Click on the **Email** icon in the **Network Services** section of the **System Preferences** window.

Step 3. To successfully use an external SMTP, you must provide both a valid **Site Email Address** and a valid **Email Address** for one of your Administrator-level operators.

Step 4. Supply your **SMTP Server** information, **Port**, and, if **Use Authentication** is needed, check that box and provide your **Log In** and **Password**. Also check **Use SSL** if needed.

Step 5. Click **Save** in the upper-right corner of the window.

Using Gmail as Your SMTP Server

One of the little-known freebies **Gmail** offers is a portable SMTP server to send mail from any network for any email address.

Step 1. Select **System Preferences** (Cmnd/Ctrl+;) from the **Edit** menu.

Step 2. Next, click on the **Email** icon located in the **Network Services** section.

Step 3. In order to access the **SMTP** tab you need to uncheck **Enable Built-in SMTP Services** in the **Email** tab; please note that the **Email** tab and the ability to **Enable Built-in SMTP Services** will be removed in the very near future.

Step 4. In the **SMTP** tab, type the following address into the **SMTP Server** field: *smtp.gmail.com*

Step 5. Be sure that the **Port** field is configured as: *465*

Step 6. Make sure that the **Use SSL** box is checked.

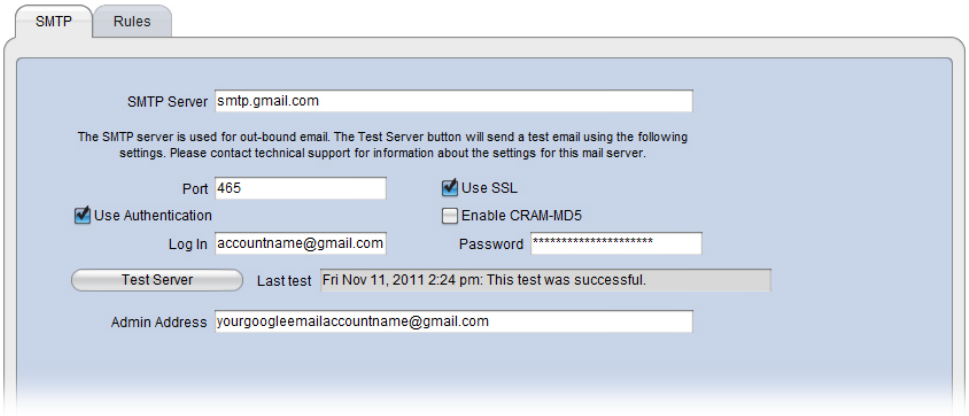
Step 7. Make sure that the **Enable CRAM-MD5** box is not checked.

Step 8. Next, check the **Use Authentication** box and provide your Google email account name in the **Log In** field.

Step 9. Provide your Google email password in the **Password** field.

Step 10. Finally, in order to use Gmail as your SMTP server you will need to enter an email address in the **Admin Address** field. After doing so, click on the **Test Server** button and verify the test email was successfully sent to the specified administrator address.

Step 11. *Voilà!* Using your Gmail account, you can now send email to *any* email address from any network that lets you connect to an outside SMTP server.



An Introduction to Importing

After successfully installing Alexandria and setting your initial system preferences, your next step is to import your patrons and items.

There are times when you'll want to add information to Alexandria from outside sources (such as MARC records, book vendors, or patron information from a central database). The process of adding information into Alexandria from outside sources is called "importing".

Alexandria supports the importation of patrons, items, and transaction commands.

Once an older version of an Alexandria data file has been imported or rebuilt into the newest version, it *can not* be downgraded. Therefore, it is *essential* to archive and backup your data prior to installing the upgrade.

Computerized Records

Before continuing, it will help to understand some basic concepts about computerized records. In order to exchange information between different programs (or even between different operating systems), the information needs to be a format that many different programs can understand. The standard, called ASCII[1], is widely used to exchange information between different programs and operating systems. Sometimes an ASCII file is called a text file ("`*.txt`") because all it contains is textual information.

ASCII files contain two types of characters: *standard visible characters* such as numbers and letters of the alphabet, and *special characters* that are called **Control Characters**[2]. **Control Characters** are used to control the display or interpret the information in the file. If you have computerized data, you may be familiar with the `<tab>` and `<return>` control characters that are used to make text more legible.

When dealing with computer information systems, you often hear the terms *field*, *record*, and *file*. A *field* is the smallest unit of information stored. An example of a field is a book's title. A *record* is a related group of fields. Many records of the same type saved together are called a *file*. For example, in a *file* of names, a *record* consists of the *fields* "`First Name`" and "`Last Name`". A more complex file may include records with other fields such as "`Phone Number`" and "`Address`". In other words, *records* contain *fields* filled with information, and *files* contain many *records*.

In the library world, there is a fairly well-defined method of exchanging bibliographic information between computers. This format is called **MARC** (for **MA**chine-**R**eadable **C**ataloguing). Another format of MARC is called **MicroLIF** (for **Micro**computer **Site Information F**ormat). Alexandria has been programmed to recognize both MARC and MicroLIF files automatically during import. Alexandria can also export in both formats.

In addition to importing and exporting MARC and MicroLIF records, Alexandria is capable of importing and exporting files in a **tab-delimited** format. This format can be used to exchange information with other programs that utilize more complex MARC standards. Most database, spreadsheet, and word-processing programs on personal computers support files in a tab-delimited format.

1.American Standard Code for Information Interchange (ASCII).
2.Since **Tab** and **Return** characters aren't visible, they are represented in this guide as `<tab>` and `<return>`.

Tab-Delimited Records

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
Bill <tab> Jones <return>
My First Name <tab> My Last Name <return>
```

For example, using tab-delimited patron import/export files, a school can transfer student information from the school information system into Alexandria (or transfer library information back to the school information system).

Alexandria's Tab-Delimited Import File Format

COMPanion has enhanced the tab-delimited format by adding special information to the first line of the file, used to interpret the data contained within. This first line is called a header because it's at the head (or beginning) of the file. The header allows COMPanion programs to figure out where the data in the file belongs. Alexandria headers look like this:

```
###*FileCode/FieldCode/FieldCode/FieldCode/ <return>
```

The ###* doesn't mean anything, but is a rather unusual character combination, unlikely to be found at the beginning of any other files. If Alexandria discovers ###* at the beginning of a file, it assumes that the file is in a familiar format.

- NOTE -

The **Field/Code** numbers (shown above) don't have any special meaning other than acting as unique identifiers for each of the fields that can be imported or exported.

The header is optional. If it's present, Alexandria will automatically sort and organize the information and place it into the proper fields. If there is no header, Alexandria provides a **Field Mapping** window, which allows you to specify the order and type of data getting imported. A header is automatically created for all export files.

Since the header is automatically created on export, the information can be easily transferred to other COMPanion software and instantly imported without the user knowing anything about the file structure. In order to be consistent, Alexandria assumes that the first line of any import file is a header; however, it only knows how to process headers in the format stated above.

Some fields allow multiple lines of information (such as patron notes). Any <return> located in a field is converted to the '\' character on export and on import, the '\' character is restored to a <return>. Generally, you don't need to know this; however, if you were to examine an export file, you'd see these characters. Also, if you wanted to add a <return> into a file that is getting imported, you can use the '\' character to make it happen.

An Example of an Alexandria Import File

A sample patron import or export file might look like this:

```
###*PT01/1000/1007/1006/ <return>
1100000 <tab> Bill <tab> Smith <return>
1100001 <tab> John <tab> Jones <return>
```

In the example above, the header field codes "1000, 1007, 1006" specify that the fields are ordered by barcode, first name, and last name. An item record will be in a similar format, except that different field codes are used and different types of field information are entered (e.g. the title or author of an item).

A simple way to study these formats is to export a few records, then examine the export file with COMPedit, Alexandria's integrated word processor.

If you export files from software suites (such as Microsoft Works), you'll notice that some may also place a header at the beginning of their files. The header contains the titles of the columns in the file you've exported. If you want, you can open your export file and replace the software suite header with a valid Alexandria header. If you don't do this manually, you'll have to make sure you select the correct fields in the **Field Mapping** window in Alexandria.

Notes:

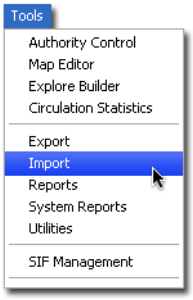
Importing Patrons & Operators

Imported patron and operators data can come from any source that provides a *text* file in a *tab-delimited* format; most word-processing and spreadsheet applications support files in tab-delimited format. In many cases, patron data is available in a machine-readable format from your school's office or from the district office. Check with your school or district office to find out how patron data is stored.

For example, you might be able to get patron information from the administrative office's school information system and import it into Alexandria. When students graduate from elementary to middle school, you can provide patron records that the middle school can import into Alexandria.

Another use for export/import is to modify information in a group of records. Patron information can be exported, opened in another computer program, modified, then returned to Alexandria. Sometimes this is much easier than modifying records (one at a time) in Alexandria.

If you have a school information system that can export data on your students in a tab-delimited format, please review the **Patrons** management window *(page 257)* to determine what fields you wish to have included in the export.

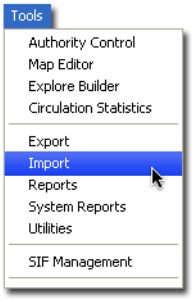


Rules for Importing Patron Information

When importing patron records, Alexandria first checks if barcode numbers and ID numbers are being imported. If they are, Alexandria makes sure these numbers are unique and not already in use by another patron.

- Alexandria looks for a header that contains a file designation of "`PT01`[1]" to specify patron information.
  `###*PT01/fieldcode/fieldcode.../ <return>`
- During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing Alexandria record is located (and the **Allow Patron Updates** box is checked in the **Patron Settings** tab of the **Data Import** window), the existing record is updated with the imported information. If **Allow Patron Updates** is not checked, the matching import records are ignored. If no records in the system match, a new record is created.
- When looking for matching records, Alexandria first checks the patron barcode, then the community ID, then the government ID. If no matches exist, the import record is considered a new record. New records are assigned the **Starting Patron Barcode** and **Patron Policy** that you've supplied in the **Data Import** window.
- Alexandria v6 recognizes Alexandria v3 patron headers to support older version data transfers.

1.The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

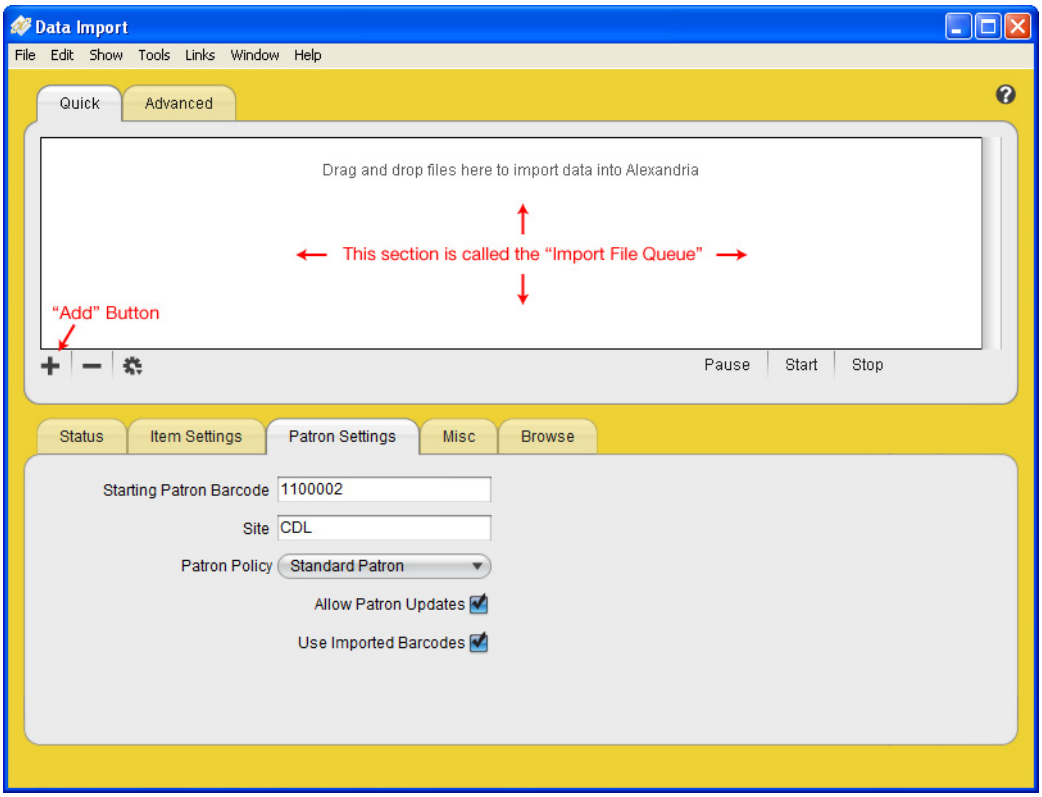


Getting Started: Importing Patron Records

To import patron records:

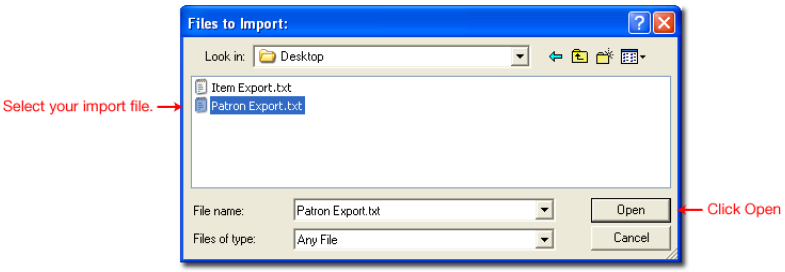
Step 1. Select **Tools** from Alexandria's main menu followed by **Import**.

Step 2. The **Data Import** window will appear.

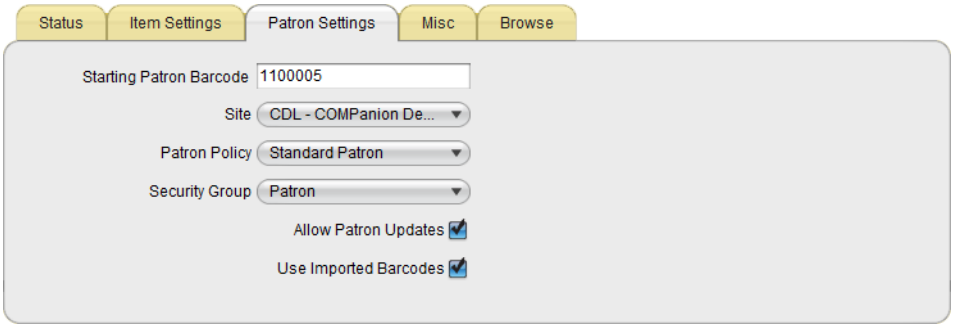


Step 3. Click the **Add** ("**+**") button, located at the bottom-left of the **Quick** tab pane; this allows you to place one (or more) import files into the import queue.

Step 4. Use the operating system standard explorer window that appears to locate and select the file you want to add to the import queue. Once the file has been highlighted, click **Open** to add it to the list. You may also add patron import files by dragging and dropping them into the import file queue.



Step 5. Click on the **Patron Settings** tab; these settings determine what changes are made to a patron record file upon import.



- NOTE-

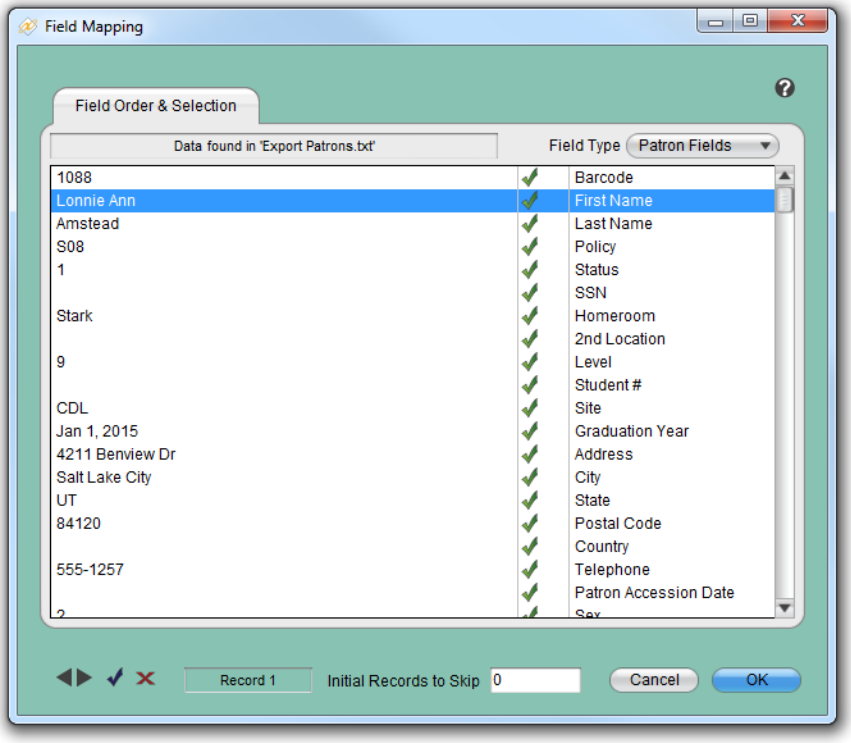
During import, if Alexandria detects a patron barcode number that is less than *three* alphanumeric digits, it will take the **Next Patron Barcode** specified in the **Management** tab of your **Patrons Site Preferences** *(page 118)* and assigns that barcode number to the patron being imported.

- **Starting Patron Barcode—**If a new patron barcode number is required, Alexandria will assign numbers starting with this value. Alexandria always checks to see if a barcode is already in use, and if it is, a new number will be automatically selected.
- **Site—**If the patron you're importing doesn't have a school defined in their import file, this field will apply a **Site ID** to their patron record.
- **Patron Policy—**If the patron you're importing doesn't have a policy defined in their import file, this policy will be applied as the default. Default is **Standard Patron**.
- **Allow Patron Updates—**When this box is checked, imported data is used to update existing patron records if certain key fields match. When this box is *not* checked, only new records are added.
- **Use Imported Barcodes—**When this box is checked, barcode numbers found in imported records are used *as is* during import. When this option is not checked, all barcodes are reassigned using your **Starting Patron Barcode** number.

Step 6. Click the **Start** button to begin the patron import. If the patron import file is recognized, Alexandria will automatically match and organize the information into the proper fields.

Step 7. If the patron import file is *not* recognized, Alexandria will ask you to specify the type of data getting imported. Choose **Patron**. The **Field Mapping** window will then appear so

that you may match data in the patron import file to specific Alexandria fields.



Use the **Field Type** drop-down menu to specify **Patron Fields**. The data from the import file is shown on the left of the window. Alexandria field names are shown on the right-hand side.

Use the arrow buttons on the bottom-left of the window to advance to the next (or previous) record in the import file. If you want to skip some of the first records in the import file, you can specify an **Initial Records to Skip** value. Default is "0".

To adjust the order of the Alexandria fields, highlight (select) and drag the field names. Align the Alexandria field names to the information in your imported data. To skip a field, double-click on it and line the green checkmark to a large, red "X". This means that the data for this field is ignored and will *not* be imported.

Step 8. Match the fields to the information in your file. Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop the import. Use the **Pause** button to halt the patron import temporarily. Use the **Stop** button to end the import completely. During import, a progress bar is shown in the **Status** tab of the **Data Import** window.

- NOTE -

Special note should be made of the **Full Patron Name** field during **Patron** data import. If you have a patron with a combined first and last name (one that has not been separated by tab delimination), use this field to split the name into **First** and **Last Name** during import.

Patron Fields by Field Number

Barcode	1000	
Community ID Code	1001	
Government ID Code	1002	
Password	1003	
Location	1004	
2nd Location	1005	
Last Name	1006	
First Name,	1007	
Middle Name / Middle Initial	1008	
Level	1010	
Address	1011	
City	1012	
State	1013	
Postal Code	1014	
Country	1016	
Phone Number	1017	
Fax	1018	
Email	1019	
Contact Notes	1020	
General Notes	1021	
Alert Notes	1022	
Categories	1025	Separate category terms with \
Status	1026	1=Active, 2=Card Lost, 3=Usage Blocked, 4=Transferred, 5=Inactive, 6=Other
Library Code	1027	For multi-collection databases
Policy	1028	Uses policy short code
Previous Policy	1029	Uses policy short code
Total Fines	1030	**Export Only*
Total Payments	1031	**Export Only*
Sex (Gender)	1032	Unknown=0 or U, Male=1 or M, Female=2 or F

Life-to-Date Usage Count	1033	**Export Only*
Number of items currently checked out	1034	**Export Only*
Life-to-Date Overdue Count	1035	**Export Only*
Number of items currently overdue	1036	**Export Only*
Number of items currently on hold	1037	**Export Only*
Current Reservations Count	1038	**Export Only*
In Stock Holds Count	1039	**Export Only*
Reserves Count	1040	**Export Only*
Keep Patron History	1041	Yes or No
Last Use Date	1042	**Export Only*
Last Validation Date	1043	**Export Only*
Next Validation Date	1044	**Export Only*
Birthdate	1045	
Patron Accession Date	1046	
Card Expiration Date	1047	
Optional Date	1048	
Additional Contact (Parent/Guardian)	1049	
3rd Location (Institution, Site, or School)	1050	
Lexile Number	1051	
User Name	1052	
Lexile Table	1060	All grades contained in single string, cells separated by || and rows by //
Credits	1061	**Export Only*
Unaccepted Credits	1062	**Export Only*
Patron RSN	1099	**Export Only*
In Transit Hold Count	1100	**Export Only*
Patron SIF Info	1200	**Export Only*
Patron SIF Info 2	1201	**Export Only*
Patron Barcode	3000	**Fine Information*
Patron Name	3001	**Fine Information*
Type	3002	**Fine Information*
Description	3003	**Fine Information*
Total	3004	**Fine Information*
Balance	3005	**Fine Information*

Importing Items

Alexandria can import item information in industry-standard MARC or MicroLIF format (also in tab-delimited format). Most word-processing or spreadsheet applications support files in tab-delimited format.

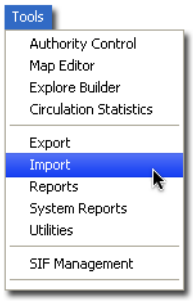
The process of taking existing catalog information (sometimes even on catalog cards) and converting the information into a machine-readable format is called retrospective conversion. This process takes time and effort. If you have an existing collection, now is a good time to examine your collection and remove unused and outdated items.

There are several methods of converting your data for Alexandria.

- **Retrospective Conversion:**
  You can hire a retrospective conversion company to create MicroLIF and MARC records for all items in your collection.

  Before sending your shelf list to the conversion company, assign barcode numbers to all the assets in your collection and record the barcode and other local information on the catalog cards. The MARC records you receive and import into Alexandria will be complete, and you will have no additional data to enter.

  This process can be time-consuming and expensive, but it is the most complete retrospective conversion method available.



- **COMPanion's SmartMARC software:**
  COMPanion offers SmartMARC, a software program that can access hundreds of Z39.50 collections using a standard internet collection. SmartMARC can also be purchased with AccessMARC's database of MARC records. You input minimal information (e.g. title, author, ISBN and/or LCCN) and then SmartMARC searches the internet for MARC records matching that information.

  Once the process is complete, you can add local information such as call number (tag **852_h**), barcode number (tag **852_p**), price (tag **852_9**), item type (tag **949_a**), special funds (tag **852_1**), and volume (tag **092_v**) to your MARC records.

  This process can save many hours of retrospective conversion. If you plan to do your own retrospective conversion, this is the best alternative.

- **Import item records into Alexandria from an outside source:**
  You can import information into Alexandria using any software that can create a *text* file in a tab-delimited format.

- **Manually enter the information into Alexandria:**
  This direct approach is much more time-consuming, but moderately more cost-effective.

Many book vendors offer MARC/MicroLIF records on file or CD-ROM for the items they sell. Conveniently, Alexandria can read MARC or MicroLIF records directly, saving you the time and energy of typing item information directly into the computer. If you are automating a new library, ask for these records when you order new items.

Rules for Importing Item Information

Importing items is remarkably similar to importing patrons. When importing item records, Alexandria first determines if it's a new item record or an existing item record that needs updating.

- Alexandria looks for a header that contains a file designation of "FT01[1]" to specify item information.
  ```
  ###*FT01/fieldcode/fieldcode.../ <return>
  ```
- During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing record is located (and the **Allow Title Updates** box is checked in the **Item Settings** tab of the **Data Import** window), the existing record is updated using the imported information. If **Allow Title Updates** is unchecked, matching records from the import file are ignored. If no records in the system match, a new record is added.
- When looking for matching records, Alexandria first checks the copy barcode, then the ISBN, and LCCN. If Alexandria finds an *exact* match for the barcode, ISBN, or LCCN, then the matching record is updated. If the previous check fails, Alexandria then looks for a matching title, author, medium, call number, publication year, publisher, extent and volume—if a matching record is located, it's updated.
- If the updated, imported record is MicroLIF or MARC and doesn't contain copy information, a new copy will be added to the record if **Always Add Copies** is selected in your **Item Import Settings**.

Alexandria performs an analysis on each and every imported MARC record imported so that information is correctly integrated—no matter the wide number of vendors. If you discover records that don't import correctly, send them to COMPanion and we'll be sure that Alexandria learns how to import them properly.

Alexandria correctly imports records from the following sources:

1987 MicroLIF
1991 MicroLIF
US MARC Communication & MARC 21
SunLink, WisCAT
Laser Cat
Dynix, Follett
Canadian MARC
...and many others since the printing of this document.

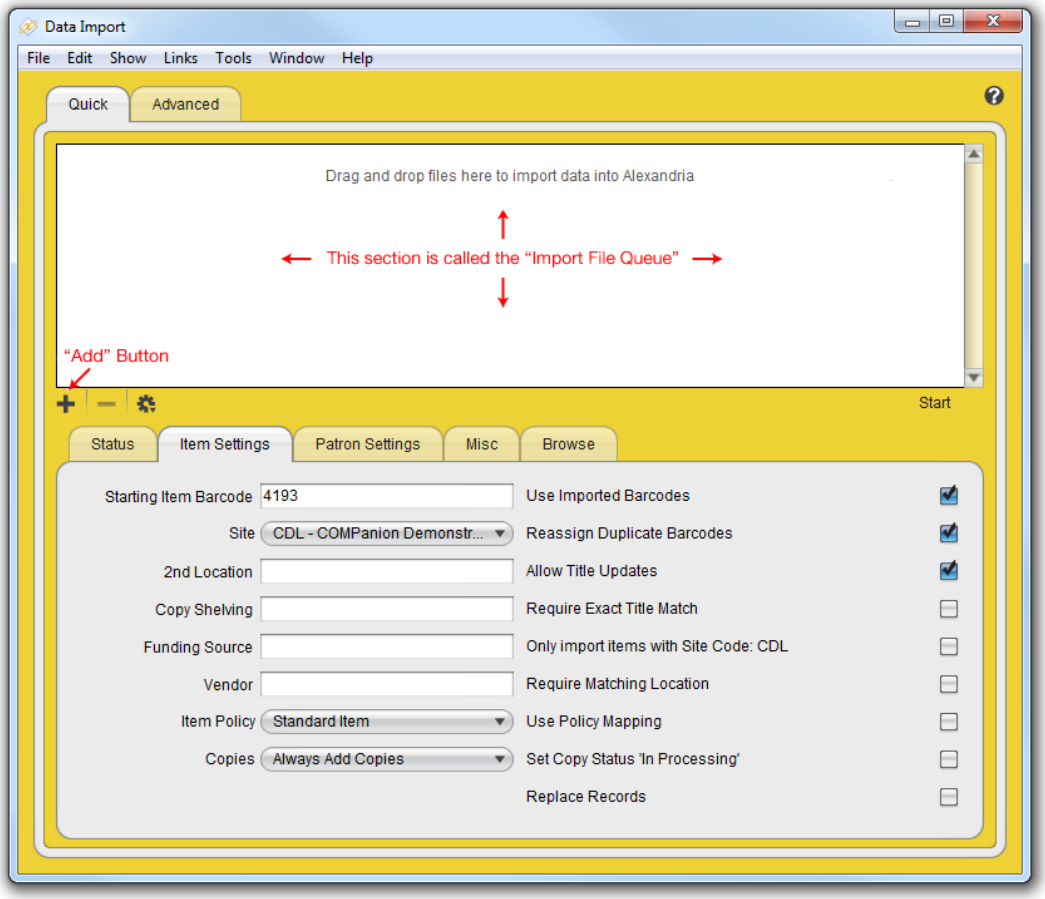
1.The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

Step by Step: Importing Item Records

Item records may be imported into Alexandria in MARC, MicroLIF, or tab-delimited format.

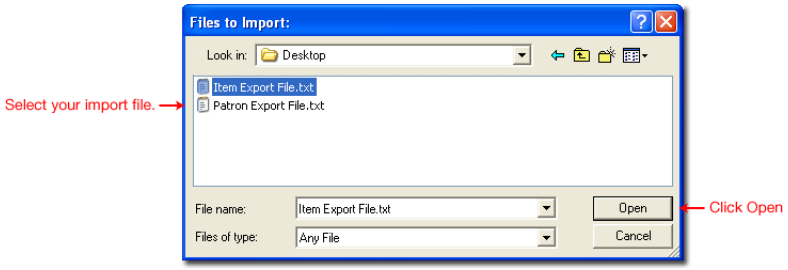
Step 1. Select **Tools** from Alexandria's main menu, followed by **Import**.

Step 2. The **Data Import** window will appear.

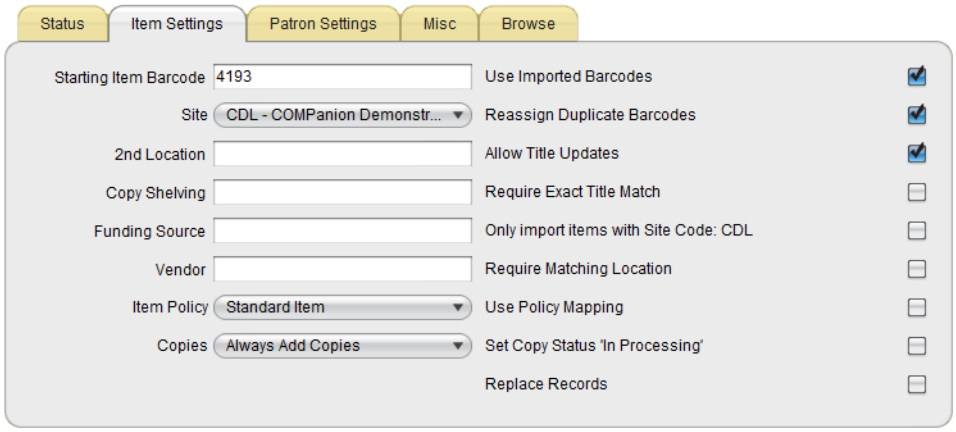


Step 3. Click the **Add** ("**+**") button, located at the bottom-left corner of the **Quick** tab pane; this allows you to place one (or more) import files into the import queue.

Step 4. Use the operating system standard explorer window that appears to locate and select the file you want to add to the import queue. Once the file has been highlighted, click **Open** to add it to the list. You may also add item import files by dragging-and-dropping them into the import field queue.



Step 5. Click on the **Item Settings** tab; these settings determine what changes are made to a item record upon file import.



- NOTE -

During import, if Alexandria detects an item barcode number that is less than *three* alphanumeric digits, it will pad the beginning of the barcode with *X*'s. For example, if you are importing an item with the barcode of "7", then Alexandria will automatically import it as "XX7".

Starting Item Barcode—If a new item barcode number is required, Alexandria will assign numbers starting with *this* value. Alexandria always checks to see if a barcode is already in use, and if it is, a new barcode number will be automatically selected.

Site—If the collection code for the record you're importing isn't specified, this collection value will be placed into the **852_a** tag.

2nd Location (Copy Location)—If the location code for the record you're importing isn't specified in the import file, this value will be applied to the **852_b** tag.

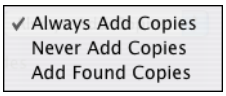
Copy Shelving—If the second location code for the record you're importing isn't specified in the import file, this value will be applied to the **852_c** tag.

Funding Source—If the funding source for the record you're importing isn't specified, this value will be applied to the **852_1** tag under a specially-formatted subfield.

Vendor—If the vendor code for the record you're importing isn't specified, this value will be applied to the **852_1** tag under a specially-formatted subfield.

Item Policy—If the item you're importing doesn't have a policy defined in the import file, *this* policy will be applied as the default. Default is **Standard Item**.

Copies—This selection determines how copies are managed during import. Default is **Always Add Copies**.



Always Add Copies—When importing, if the record being imported doesn't contain any copies, then a new copy is added to the title record even if Alexandria already has a matching title with a copy.

Never Add Copies—Copies contained in import files are essentially ignored; only title information will be imported.

Add Found Copies—If you're allowing title updates and a match is made, copies will be added or updated as appropriate. If you're not allowing title updates, this selection simply adds a new title for every record imported and adds all copies that are included in the import record (there is no matching; any barcodes that are duplicates of barcodes that already exist within your Alexandria database will be reassigned).

Use Imported Barcodes—When this option is selected, barcode numbers found in the import records are used *as is* during import. When this option is not checked, all item barcodes are reassigned using the **Starting Item Barcode** number (detailed on the previous page).

If you know for sure that your vendor assigned "dummy" barcode numbers to your MARC records, you'll want to turn this option **Off** to force Alexandria to assign new barcode numbers that coincide with your numbering strategy.

Reassign Duplicate Barcodes—When checked, any barcode numbers that match barcode numbers that already exist within your Alexandria database will be reassigned using the **Starting Item Barcode** number (detailed on the previous page).

Allow Title Updates—When this option is checked, imported data will update existing titles if specific key fields match (e.g. barcode, ISBN, LCCN, title, author, and more). Non-repeating tags that exist in both the data and the import will be replaced; new tags will be added to the data for repeating tags. When this option is *not* checked, only new records will be added.

Typically, you'll want Alexandria to add new copies to existing titles, or use import files to update brief records. If, however, you want Alexandria to create a new title record for each MARC record you import, uncheck this option.

On—If title or copy data is matched, the existing title record is modified (whether that means adding copies or updating copy and title info).

Off—Existing titles are never updated via import. If an imported barcode matches an existing barcode, it is reassigned. Title records are added—copies may (or may not be) added.

Require Exact Title Match—When checked, existing titles in the database will only be updated when there is an *exact* title match. When unchecked, a close match is acceptable, allowing for differences in cataloging with or without leading articles and other slight variances.

Only Import Items With Site Code: XXX—If checked, the library code entered above must match the library code in at least one copy from each title being imported/updated. If unchecked, the library code entered above will be used if the imported collection code is blank.

Require Matching Site—If checked, the **Site** ID code provided on this tab *must* match the site ID code of at least *one* copy from each title being imported/updated. Copy data is ignored when the **852_a** tag (i.e. site ID code) doesn't match the specified **Site** ID code. If unchecked, the **Site** ID code provided on this tab will be used if the imported collection code is blank and *all* copies will be imported—no matter what their **852_a** tag contains.

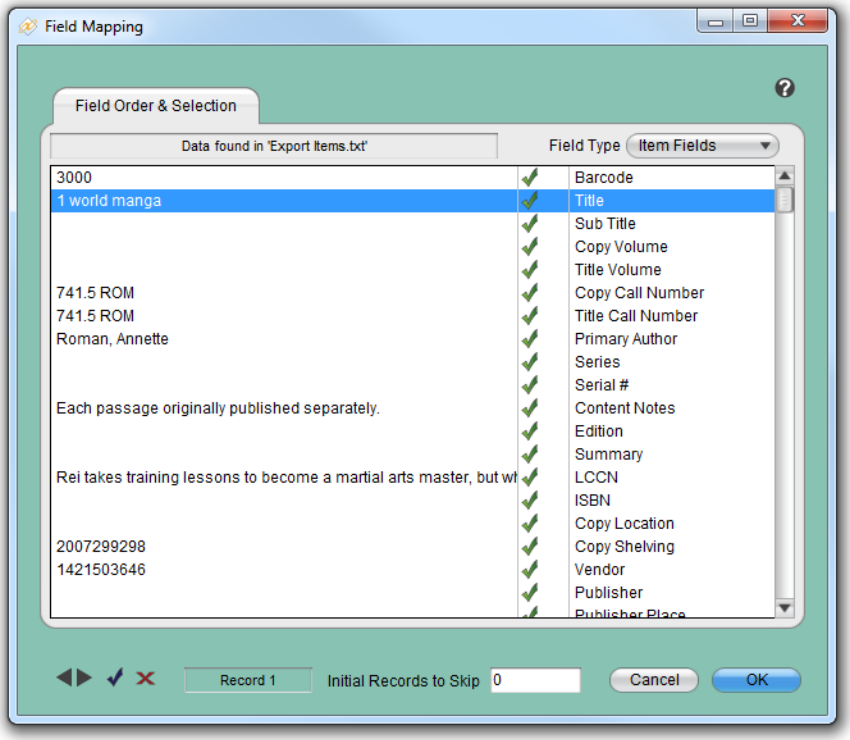
Require Matching Location—If checked, the **Copy Location** provided on this tab *must* match the copy location of at least *one* copy from each title being imported /updated. If unchecked, the **Copy Location** provided on this tab will be used if the imported copy location is blanks; all other copy location information is ignored.

Use Policy Mapping—When checked, items will be assigned an **Item Policy** based on their call number (within the call number range specified in your **System Policies System Preferences** window). See your **Policies** and **Call Number Mapping System Preferences** for more information on **Policy Mapping**.

Set Copy Status 'In Processing' (**Quick** tab only)**—**There are times when items are imported into Alexandria or Textbook Tracker, but they are not ready for the shelf. For example, sites that purchase MARC records from a vendor need to be imported before your operators can finish processing the books. Checking the **Set Copy Status 'In Processing'** box allows you to change the copy status of all items being imported from **Available** to **In Processing**. Later, you can run a utility to automatically change the copy of the items to **Available**.

Step 6. Click the **Start** button to begin the item import. If the item import file is recognized, Alexandria will automatically match and organize the information into the proper fields.

Step 7. If the item import file is *not* recognized, Alexandria will ask you to specify the type of data getting imported. Choose **Item**. The **Field Mapping** window will then appear so that you may match data in the item import file to specific Alexandria fields.



Use the **Field Type** drop-down menu to specify **Item Fields**. The data from the import file is shown on the left of the window. Alexandria field names are shown on the right-hand side.

Use the arrow buttons on the bottom-left of the window to advance to the next (or previous) record in the import file. If you want to skip some of the records in the import file, you can specify an **Initial Records to Skip** value. Default is "0".

To adjust the order of the Alexandria fields, highlight (select) and drag the field names. Align the Alexandria field names to the information in your imported data. To skip a field, double-click on it and line the green checkmark to a large, red "X". This means that the data for this field is ignored and will *not* be imported.

Step 8. Match the fields to the information in your file. Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop the import.

Use the **Pause** button to halt the item import temporarily. Use the **Stop** button to end the import completely. During import, a progress bar is shown in the **Status** tab of the **Data Import** window.

Item Fields by Field Number

Barcode	2000	852_p
Copy Last Used Date	2001	**Export Only*
Copy Check Out Count	2002	**Export Only*
Copy Days in Circulation	2003	**Export Only*
Copy Last Modified Date	2004	**Export Only*
Prior Patron Barcode	2005	**Export Only*
Previous Prior Barcode	2006	**Export Only*
Before Previous Patron Barcode	2007	**Export Only*
Inventory Date	2008	852_1
Accession Date	2009	852_1
LCCN	2010	010_a
Replacement Cost	2011	
Purchase Cost	2012	852_9
Current Policy	2013	
Previous Policy	2014	**Export Only*
Copy Status	2015	**Export Only*
Vendor	2016	852_1
Copy Condition	2017	852_1
Copy Notes	2018	852_x
Copy Alert	2019	852_z
ISBN	2020	020_a
Copy Number	2021	852_t
Funding Source	2022	
Copy Collection	2023	852_a
Copy Location	2024	852_b
Copy Call Number	2025	852_h
Copy/Title Volume	2026	852_v
Shelving Field	2027	
Bibliographic Codes/Keywords	2040	Separated by \

Curriculum Keywords	2041	Separated by \
Don't Show in Alexandria Researcher	2042	Yes or No
Copy Count	2043	**Export Only*
Available for Checkout	2044	**Export Only*
Title Life-to-Date Usage Count	2045	**Export Only*
SmartMARC Matching Score	2046	**Export Only*
Title Accession Date	2047	**Export Only*
First Use Date	2048	**Export Only*
Last Use Date	2049	**Export Only*
Last Modified Date	2050	**Export Only*
Last Modified User ID	2051	**Export Only*
Title Current Policy	2052	**Export Only*
Title Previous Policy Short Code	2053	**Export Only*
Last Validation Date	2054	**Export Only*
Checked Out To	2055	**Export Only*
Title Call Number	2063	
Copy Volume	2064	
Title RSN	2099	**Export Only*
Primary Author	2100	From: 100_a
Full Title	2240	Title: Subtitle—*Export Only*
Title	2245	245_a
Subtitle	2246	245_b
Statement of Responsibility	2247	245_c
Medium	2248	245_h
Edition	2250	250_a
Publisher Place	2260	260_a
Publisher	2261	260_b
Publisher Year	2262	260_c
Extent	2300	Full description—*Export Only*
Physical Description	2301	300_a
Other Physical Details	2302	300_b

Dimensions	2303	300_c
Accompanying Material	2304	300_e
Series Title	2440	830
Serial Number	2441	
General Note	2500	500_a
Content Note	2501	
Summary	2520	520_a
Target Audience Note	2521	521_a
Review Source	2522	521_b
Before Previous Patron Barcode 2	2600	**Export Only*
Before Previous Patron Barcode 3	2601	**Export Only*
First Subject	2651	650_a--650_x--650_y--650_z
URL	2530	
URL Description	2531	
Second Subject	2652	650_a--650_x--650_y--650_z
Third Subject	2653	650_a--650_x--650_y--650_z
Fourth Subject	2654	650_a--650_x--650_y--650_z
Fifth Subject	2655	650_a--650_x--650_y--650_z
Author List	2700	**Export Only*
Study Program Name	2750	
Study Program Interest Code	2751	
Study Program Reading Level	2752	
Study Program Point Count	2753	
Study Program Test Number	2754	
Study Program Holding Code	2755	
Last Library	2756	**Export Only*
Lexile	2757	
Lexile Code	2758	

An Introduction to Reports

Set them, and forget them!

The **Reports** window allows you to create a nearly endless variety of reports. You choose the information you want to include and how it's arranged and organized. In other words, you write the report!

Essentially, this window provides general templates that help you build reports that meet the form, content, and organizational requirements for your department, school, or district. Once you've created your own custom reports, there won't be a need to adjust the particulars very often.

Each report can output "*.pdf*" or "*.vwp*" documents that provide detailed and contextually relevant information about account and financial activity, and more—all the way down to the transaction level.

The following section provides a brief overview of the **Reports** window and then guides you through the process of creating a report.

The Reports Window In More Detail

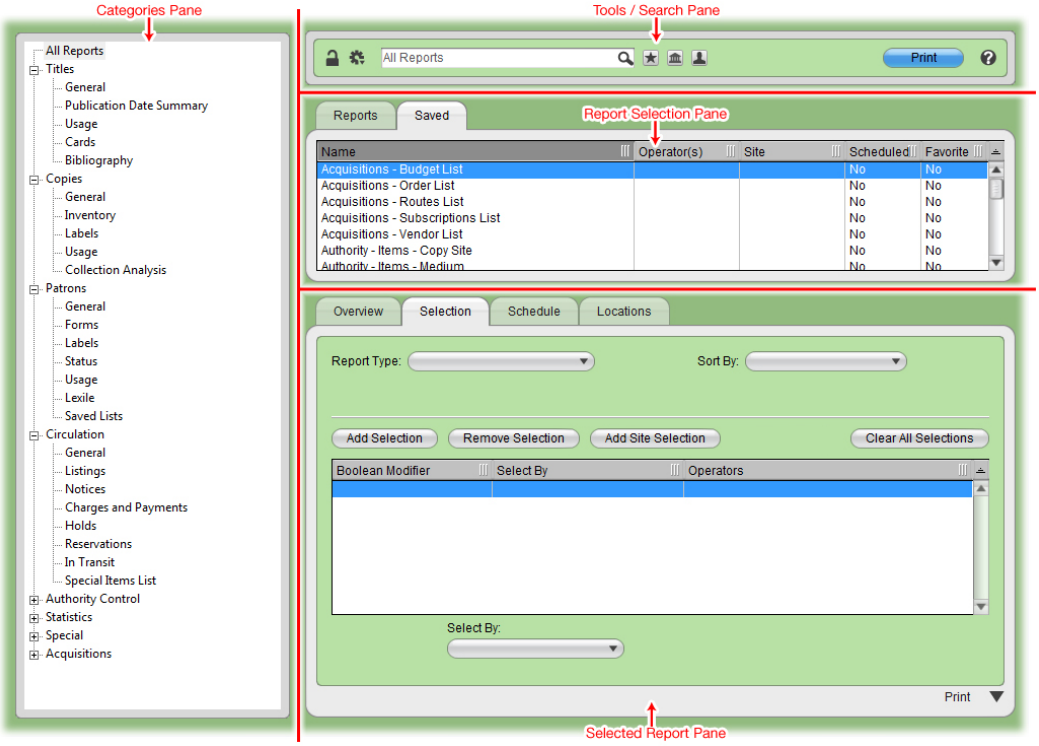
At first glance, faced with an abundance of tabs and large fields crammed with lists of report names, the **Reports** window may likely seem overwhelming. *Don't panic!* Although it may look complicated, the **Reports** interface was designed with simplicity in mind; placing everything in a single, easily navigable window that allows you to quickly find, modify, create, and print reports.

Additionally, the **Reports** window allows you to customize reports to only include pertinent information: records of interest, transaction types, balance selections, and personalized text on circulation notices. You can also schedule reports and deliver their output via email, FTP, etc.

In order to become a report wizard, there are only three essentials you need to understand: category searching, report templates, and creating custom reports.

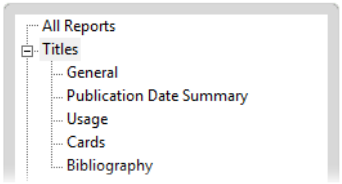
The **Reports** window was developed using the familiar three-panel layout found in many of Alexandria's main management windows.

- The left-hand side of the window is home to the report **Categories** pane, containing an organized list of all existing report categories (e.g. **Titles**) and subcategories (e.g. **Publication Date Summary**). Selections from this pane act as filters, allowing you to narrow your focus and display only relevant reports.
- The upper-right section of the window contains the **Report Tools/Search** pane along with the **Report Selection** pane (i.e. the **Reports** and **Saved** tabs), which allow you to select the specific report you would like to view, modify, or print.
- The **Selected Report** pane—the bottom-right area of the window—contains options for the highlighted (i.e. selected) report, housed in the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Locations**.



Report Categories Pane

The first step in producing meaningful reports is picking the proper report category. The report **Categories** pane on the left-hand side of the window is a collection of categories and subcategories that can reduce the number of results that appear in the **Report Selection** pane (i.e. the **Reports** and **Saved** tabs) on the right. You are able to expand or contract associated subcategory sections by clicking on the icon located to the left of the main category name. Selecting (highlighting) one of the main category (or subcategory) names (e.g. **Titles**) will reveal all of the reports available for that category (or subcategory). For example, if you want to print a **Charges and Overdue Fines** report, you can't do it with the **Patrons** category selected—it's a **Circulation** (category) report that you'll find under the **Charges and Payments** or **Listings** subcategories. Selecting the **All Reports** selection at the top of the categories list will populate the **Reports** and **Saved** tabs with *all* available report options.



The **Search** bar (described on the following page) works in close conjunction with the report **Categories** pane. In some ways, the **Search** bar acts as the consummate report filter—usurping the **Categories** pane; operators may find themselves never using the report **Categories** filters, preferring to use the **Search** bar instead.

The **Search** bar is used to further reduce the number of results shown in the **Reports** and **Saved** tabs. For example, if you have the **All Reports** category selected from the report **Categories** pane and then type "budget" in the **Search** bar, you will only see reports related to budgets in the **Reports** and/or **Saved** tabs. The **Search** bar is described in more detail in the following page.

Reports Tools / Search Pane

The greater half of the **Reports** window is mostly dedicated to the currently selected report (filtered using the report **Categories** pane on the left), which contains all of the report's configurable options and editable fields.

Topping this section of the window is a long, rectangular area containing the **Save All** and **Revert All** buttons[1], the **Print** button, the **Online Help** icon, the **Lock/Unlock** icon and the primary **Actions** icon which performs functions related to the selected report.

Unlock/Lock Icon—When the **Reports** window is opened, the default state of the **Saved** tab is usually "locked". When locked, **Saved** reports can be viewed and printed, but modification to any of the report settings is disabled until unlocked. Clicking the lock icon unlocks the **Saved** tab; it stays unlocked until you click the lock icon again or the window is closed. You can choose whether you want to have the **Reports** window automatically locked or unlocked by default using the **Database Management Windows Locked By Default** option in the **Site Information** system preferences.

Actions—The gear/cog menu contains report-specific functions and other tools; the options available in the **Actions** menu differ based on whether the **Reports** or **Saved** tab is selected.

- **Lock/Unlock Report** (Cmnd/Ctrl+U)—The lock icon only appears in the **Reports Tools / Search** pane when the **Saved** tab is selected and prevents an operator from making any changes to the currently selected report. When the **Saved** tab is locked, reports may still be viewed and printed, but modification of any of the report settings are disabled until the report is unlocked. The **Saved** tab will remain unlocked until an operator makes the **Lock/Unlock Report** (Cmnd/Ctrl+U) selection again, or the window is closed.
- **Save Report** (Cmnd/Ctrl+S)— Saves only the currently selected (i.e. highlighted) **Saved** report.
- **Create New Saved Report / Duplicate** (Cmnd/Ctrl+D)—Duplicates the currently selected report and asks that you provide a new name; available in both **Reports** and **Saved** tabs.
- **Save All Reports** (Cmnd/Ctrl+Alt/Option+S)—Saves *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Revert Report**—Reverts only the currently selected (i.e. highlighted) **Saved** report.
- **Revert All**—Reverts *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.

1.The **Save All** and **Revert All** buttons are conditional and *only* appear when a changes have been made to various fields of a report selected from the **Saved** tab.

- **Add to/Remove From Favorites**—This option will "favorite" or "un-favorite" the selected (i.e. highlighted) report in the **Saved** tab; essentially, this option will either check or uncheck the **Favorite** box in the **Overview** tab of the selected report.
- **Delete Selected Report** (Cmnd/Ctrl+R)—This selection completely removes the selected (i.e. highlighted) report from the **Saved** tab. This can *not* be undone, so think twice before making this selection.
- **Delete All Reports Shown**—This selection will completely remove *all* of the reports currently shown in the **Saved** tab; those in the **Reports** tab will remain unaffected. This can *not* be undone, so use caution before making this selection.

Search—The **Search** bar, in correlation with the report **Categories** pane, can be used to further filter the list of results shown in the **Reports** and **Saved** tabs. To illustrate, if you select (highlight) the **Copies** category from the report **Categories** pane and then type "labels" in the **Search** bar, you will only see copy label-related reports in the **Report** and **Saved** tabs. If you have **All Reports** selected from the **Categories** pane and then type "labels" into the **Search** bar, you would see results for *all* types of label reports.

Faded text appears in the **Search** bar prior to entering text of your own to remind you what report category/subcategory filter is being applied to your results. For example, if you've selected **Patrons** (category) - **Status** (subcategory), the default shadow text in the **Search** bar will read: **Patrons – Status**.

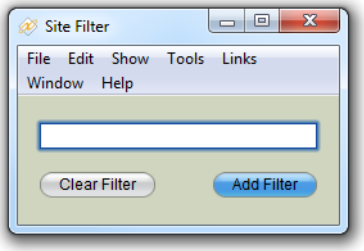
If you would like to search the entire collection of reports you will first need to select (highlight) **All Reports** from the top of the report **Categories** pane section and then provide a term in the **Search** bar. For instance, if you're looking for a simple **Copy List** report and don't want to bother with the category/subcategory filters, simply select **All Reports** and start typing "`Copy List`" in the **Search** bar.

- NOTE -

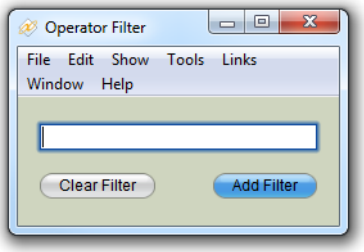
The **Search** bar is extremely helpful in that it actually searches every editable field of the **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Locations** tabs and even multiple fields if search terms are separated by a space.

- **Favorites Filter**—This button only appears when the **Saved** tab is selected and will only show currently favorited reports. Once clicked, the filter remains enabled until it is manually disabled.

- **Site Code Filter**—This button only appears when the **Saved** tab is selected. Once clicked, it opens the **Site Filter** window, allowing you to enter a valid site ID code. After typing the first few characters, the site ID code will auto-complete—provided you have a matching site in your **Site Management** system preferences. After clicking **Add Filter**, every search performed from the **Search** bar will filter your results by matching **Site ID Code(s)**. The filter remains enabled until it is manually disabled.



- **Operator Filter**—This button only appears when the **Saved** tab is selected. Once clicked, it opens the **Operator Filter** window, allowing you to enter a valid operator(s) name. After typing the first few characters, the operator name will auto-complete—provided you have a matching operator in your **Operators** system preferences. After clicking **Add Filter**, every search performed from the **Search** bar will filter your results by matching **Operator(s)** name. The filter remains enabled until it is manually disabled.



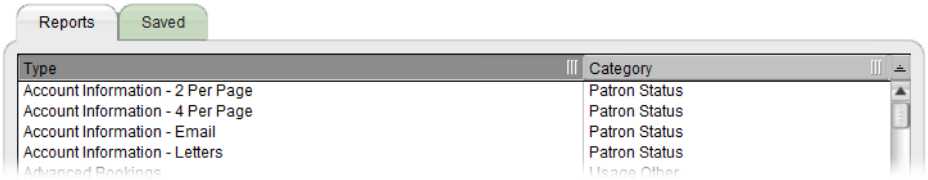
- **Save All**—Saves *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Revert All**—Reverts *all* changes made to multiple **Saved** reports in the **Reports** window; this option only appears when changes have been made to the selected—or any formerly selected—report in the **Saved** tab.
- **Print—**Clicking the **Print** button at the top of the window opens the **Operation Management** window and outputs a *".pdf"* for the selected report (which will then open automatically); however, report PDFs are also saved to the **Alexandria Support** directory in a folder named **Operation Files**. The **Print** button is replaced by the **Revert All** and **Save All** buttons once a report record has been modified and will remain that way until the report is saved. Every time you print a report, it will be documented in your **Transaction** log.
- **Online Help**—Performs an online **Reports** help query in an external browser window—corresponding to the current report selection.

Report Selection Pane

Directly below the current report **Tools / Search** pane is the **Report Selection** pane, home of the **Report** and **Saved** tabs. Remember, the reports that appear in the **Report** and **Saved** tabs directly relate to the category (or subcategory) that is selected from the report **Categories** pane on the left-hand side of the window and/or to the text that is entered into the **Search** bar.

The Reports tab

The **Reports** tab houses the complete list of *all* available report types and their related categories; essentially, an exhaustive report depository, containing every existing report template—used for quickly printing in an "ad-hoc"[1] style or reconfigured and conveniently saved (as a **Saved** report) for future use. These templates store *no* customized selection settings and should *not* be confused with default (or operator-created) **Saved** reports. If you haven't been able to locate the report template you are looking for, chances are you will find it here.



Using the report **Categories** pane, the **Reports** tab results can be filtered to only show reports pertaining to selected categories/subcategories. For example, if you select **Circulation** from the report **Categories** pane, the **Reports** tab will only display **Circulation** reports; if you select a **Circulation** subcategory (e.g. **Listings**, **Notices**, **Holds**, etc), your results will be further refined.

Selecting a report type from the **Report Selection** pane automatically populates the bottom portion of the window (i.e. **Selected Report** pane) which contains report information in the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. These tabs contain the essential selection criteria that is crucial to how information in the report is ordered, organized, and presented. By default, the **Selection** tab has focus when the **Selected Report** pane is first made active.

Reports performed from the **Reports** tab are considered "quick" or "impromptu"; any modifications made to the **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, or **Location** tabs are discarded immediately after switching to another report category.

For example, if you have the **Titles** (category) - **General** (subcategory) - **Title List** (report type) selected and then click on the **Copies** category, all information that you may have modified or provided to the **Title List** report will be lost. Even if you were to immediately return to the **Titles** (category) - **General** (subcategory) - **Title List** (report type), you would find all your changes missing.

However, if you would like to save the "ad-hoc" report you've just been modifying in the **Reports** tab, click **Create New Saved Report** at the bottom of the **Selected Report** pane; this will add the current report type—including your modifications—to the **Saved** tab as a brand new report.

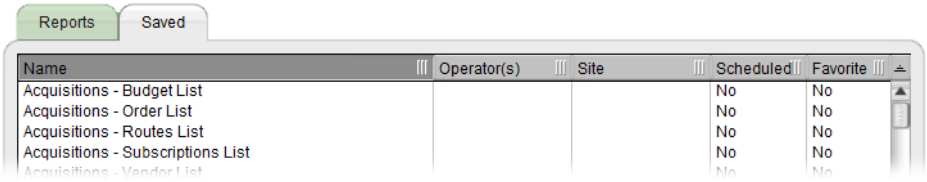
If the new report has *not* been given a **Name** in the **Overview** tab, a query window will appear, asking for you to provide a name for the new **Saved** report. By default, the **Report Type** name (appended with the word "copy") will automatically populate the **Name** field.

1.Often improvised or impromptu; for a particular or specific purpose only, and for no other.

The Saved tab

Alexandria makes it easy to create your own frequently-used, custom reports. The **Saved** tab contains a list of previously created reports; these can be system defaults or operator-created. Individual **Saved** reports can be "favorited" by checking the **Favorite** box in the **Overview** tab; if the check is removed, it will no longer be marked as a "favorite" report.

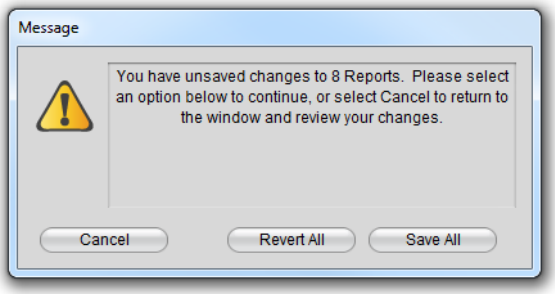
Keep in mind that a **Saved** report is only the selection criteria that was used to create the report and *not* the results of the report itself. However, by default, all reports output to *".pdf"* or *".vwp"* are saved to the **Alexandria Support** directory in a folder named **Operation Files**.



The **Saved** tab contains system defaults as well as custom reports that operators have created and saved. You can click on the column headers (e.g. **Name**, **Operator(s)**, **Site**, **Scheduled**, and **Favorite**) in the **Saved** tab to change the sort order. When the **Saved** tab is selected, the **Operator Filter**, **Site ID Code Filter**, and **Favorites Filter** buttons *(see page 178)* become available in the report **Tools**/**Search** pane.

Using the report **Categories** pane, **Saved** tab results can be filtered to only show reports from selected categories/subcategories. For example, if you select **Patrons** from the report **Categories** pane, the **Saved** tab will only show operator-created **Patrons** reports; if you select a **Patrons** subcategory (e.g. **Forms**, **Labels**, **Usage**, etc), your results will be filtered further.

When a report appears red in the **Saved** results, it indicates that unsaved changes have been made to the report. When a **Saved** report has been changed, the **Revert All** and **Save All** buttons appear in the **Report Tools**/**Search** pane in place of the **Print** button; these buttons will save or revert *all* of the currently modified reports. If you try to close the **Reports** window with unsaved changes, Alexandria will ask that you save or revert *all* your changes; otherwise, click **Cancel** to return to the **Reports** window.

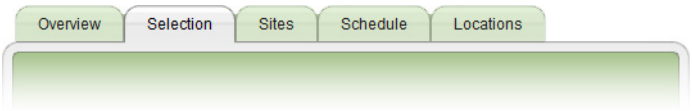

Message
You have unsaved changes to 8 Reports. Please select an option below to continue, or select Cancel to return to the window and review your changes.
Cancel
Revert All
Save All

When you make a report selection from the **Saved** tab, the **Selected Report** pane (i.e. the bottom-half of the window) is populated with the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. By default, the **Overview** tab has focus when the **Selected Report** pane is first made active.

Once a **Saved** report has been selected, it can then be printed, modified, duplicated, or removed.

Selected Report Pane

The lower-right area of the **Reports** window is home to the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. These tabs allow you to configure selection, schedule, and output options for the report currently selected in the **Reports** or **Saved** tab. Not only that, they contain the essential selection criteria that is crucial to how information in the reports is ordered, organized, and presented.

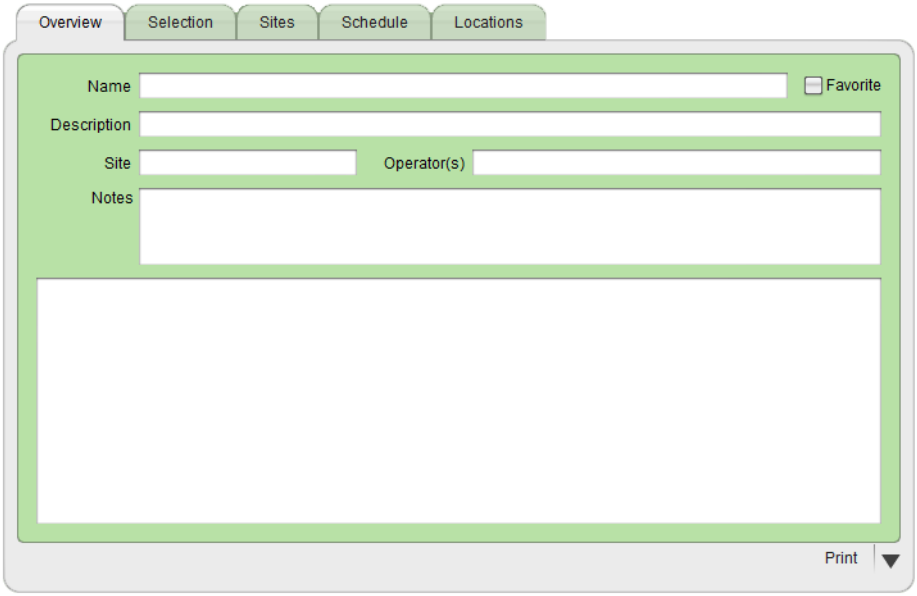


Be sure to *always* **Save All** changes you make to the **Saved** reports in the **Reports** window so that you're guaranteed to have full, working, and scheduled reports.

Should you want nearly identical settings for each new operator-created report, you can **Duplicate** (Cmnd/Ctrl+D) them, give them a new name, and make whatever modifications you require (name, boolean, email, etc).

Overview tab

The **Overview** tab offers a detailed summary about what the report generates, what it selects and sorts by, whether or not it's scheduled, and where it outputs. This tab also allows you to name the report (e.g. *Mrs. Smith - Overdues*), give it a succinct description (e.g. *1-Line Overdue Listings*), and leave yourself (or others) usage notes (e.g. *Run this report weekly!*).



Overview Summary

Name—Provide or edit the name of the report here (e.g. *Dr. Linus - LOST books*).

Favorite—When this option is checked, the selected report will be classified as a "favorite" and can be ordered or filtered by such using the **Favorite** column header of the **Saved** tab or the **Favorites Filter** button *(page 179)*. Favoriting frequently-used reports is often helpful when you quickly need to locate one, especially if you find yourself running the same reports daily.

Description—A brief description of the report (e.g. *Overdue listing and charges for Ms. Kathy's Homeroom*).

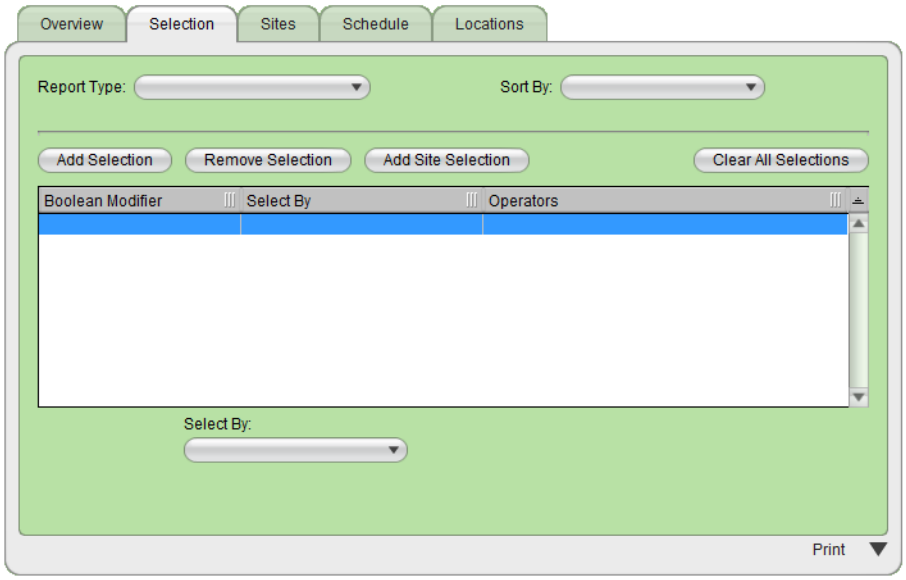
Site & **Operator(s)—**These fields allow you to add and filter selected **Saved** reports by valid operators and/or site ID codes. If **Require Operators to Log In** (from the **Operators** system preferences) is enabled, the **Operator(s)** and **Site** fields are automatically populated with the current operator's name and site ID code. If **Require Operators to Log In** is disabled, you can still provide this information manually and use the **Operator**/**Site Code Filter** buttons *(page 180)*, but the **Operator(s)** and **Site** fields are *not* automatically populated when creating a new saved report.

Notes—Provide general usage notes about the report here (e.g. *Report created for Marjorie - Run daily!*).

Overview—This large field provides a summary of what the report generates: its **Search By** and **Sort By** options, scheduled run times, selected sites, and saved file locations/outputs.

Selection tab

The **Selection** tab is where you build the report to suit your needs. The best way to use this tab is to fill in the fields and drop-down menus from left to right, top to bottom.

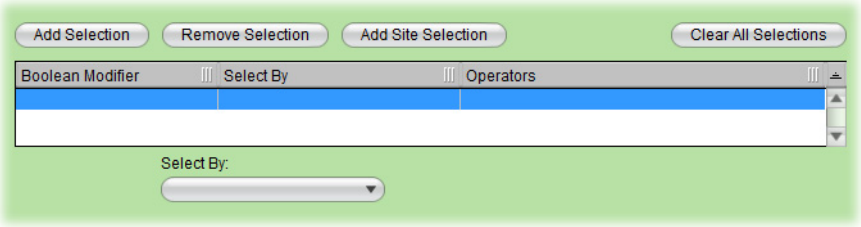


When creating a new report, you must first choose the *type* of report you would like to build. The **Report Type** drop-down menu is *only* available from the **Saved** tab and is limited to the category for which the selected report belongs. For example, if **Circulation Notice – 4 Per Page** is the currently selected **Saved** report, the only available **Report Type** options will be related to the **Circulation** (category) - **Notices** (subcategory).

After you choose the report type, use the combination of drop-down menus, checkboxes, and text fields available from the **Selection** tab to build, format, arrange, limit and/or expand the information included in the report. The available options will differ from report to report depending on your selected **Report Type**; for instance, most (but not all) **Report Types** have an affiliated **Sort By** drop-down selection. For more information about the options available for each report, review the corresponding report page.

After selecting the initial information and layout, you can further refine your report using boolean selections; adding selections can help to make your report more efficient and meaningful. For example, say you want to print several **Weeding Lists** of damaged books to be pulled from library shelves. You intend to distribute these lists to your library aides based on the copy call numbers of the damaged items. In this case, you would likely want to sort the report by **Copy Call Number** (for ease of distribution) and then use boolean modifiers to assign specific areas to specific library aides. You could add a **Copy Status** selection (e.g. listed as **Available** and on your shelf), a **Copy Condition** selection (e.g. **Replace this item, not usable**) and finally a **Copy Shelving** selection (to make it easier to hunt down the damaged copies).

The **Add Selection**, **Remove Selection**, **Add Site Selection**, and **Clear All Selections** buttons appear *above* the boolean list. When applicable, the boolean operator drop-down menu (i.e. *OR*, *AND*, and *AND NOT*) appears to the left of the **Select By** drop-down menu while any related selection fields appear to the right; all this is located *below* the boolean list.



At this point, once the report is set up, you can print straight from the **Selected Report** pane (via "*.pdf*" or "*.vwp*") without doing anything else—especially if it's an "ad-hoc" report that you'd like to see on a whim but aren't necessarily going to need again in the future.

Selection Summary

The **Selection** tab will vary from report to report; the following details the most common features:

Report Type—Choose your general **Report Type** format first; you can only select report types based on the subcategory for which the report belongs. Depending on the **Report Type** you choose, additional selection options may be available.

Sort By—The selection made from the **Sort By** drop-down menu determines how information in the report is ordered. Some selections sort by two (or more) values (e.g. **Patron Level / Name**). A complete list of report sorting options can be located on Alexandria's Online Help.

Select By—This powerful drop-down menu allows you to add boolean modifiers that shape the report by including only the information you require. The **Select By** options are processed in top-down order[1]. You won't usually have to worry about the default values provided in the boolean list; instead, you'll want to use the **Add Selection** button to add your own modifiers. As you choose values from the selection drop-down menus, associated blank fields may appear, prompting you for information.

One example would be the **Starting** and **Ending Date**[2] fields that appear when **Due Date** is chosen from the **Select By** drop-down menu, allowing you to provide a date range between a starting and ending value.

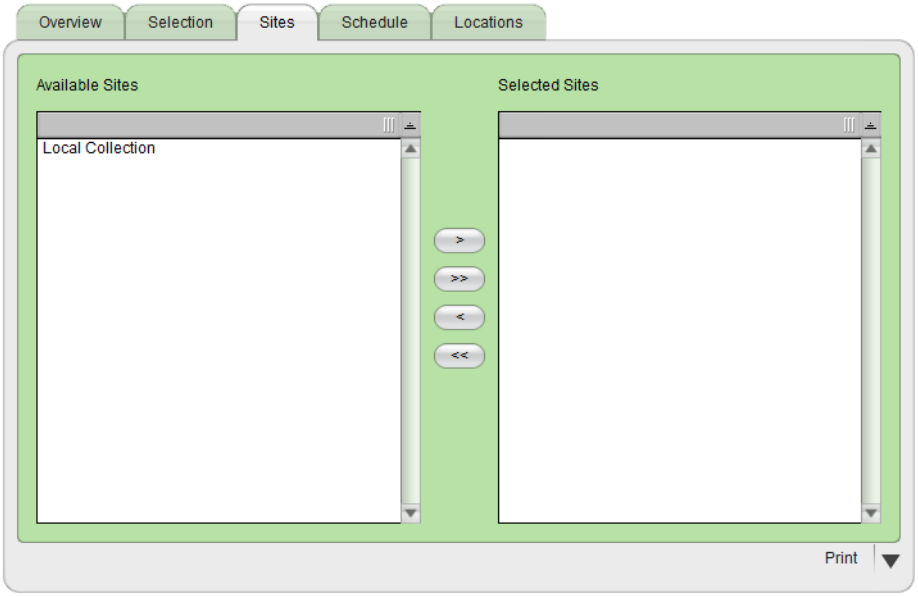
Another example would be the **Starting** and **Ending With** fields. If you enter *only* a **Starting With** value, the program will select all records that begin with the entered text. Entering a **Grade** value of *"GR1"* would select grades *"GR100"*, *"GR10"* and "*GR1B37"*. Therefore, use *both* the **Starting** and **Ending With** fields, even if you are only searching for *one* value (e.g. *Silver*, *Silver*). To do an *exact* match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. Using **Grade** as our example, **Starting With** *"GR1"* and **Ending With** *"GR1 !"* (unless you really do have data named *"GR1 !"*). In other words, if you have two values with shared characters (e.g. *Silver, Silverman*) and don't want the report to apply to both, append the secondary (i.e. **Ending With**) value with a space and an exclamation mark (e.g. *Silver !*). A complete list of report selections options can be located on Alexandria's Online Help.

1.Using both **And** and **Or** operators at the same time *will* affect the results.
2.When you enter any type of specially-formatted information—such as dates—you can enter values in a wide range of formats. For example, you can enter the date December 1, 2015 as: *"Dec 1, 2015"* or *"12/1/15"* or *"12.1.15"* or *"12 1 15"*. If using the current year, you can just enter *"12/1"*. If the current month is December, you can just enter *"1"*. If you enter only a **Starting Date**, the program generates a "far future" date—which is the first of January, thirty years from the current date. If you enter only an **Ending Date**, the **Starting Date** defaults to January 1st, 1904 (i.e. the "far past"). If you don't enter any date, the **Starting Date** is set for one year in the past.

Sites tab (Distributed Union)

- NOTE -
The **Distributed Union** is an optional configuration of Alexandria and Textbook Tracker. You must have purchased the WAN license in order to use this configuration.

The **Sites** tab (only available for **Distributed Union** users) lets you choose which collections to draw the report information from. That means if you have multiple sites, you can generate reports for more than one library, or just your own library. The **Sites** tab is *not* available for all reports.



Sites Summary

- Use the " **>** " button to move a selected (highlighted) site from the **Available Sites** to the **Selected Sites** field.
- Use the " **>>** " button to move *all* **Available Sites** to the **Selected Sites** field.
- Use the " **<** " button to move a selected (highlighted) site from the **Selected Sites** to the **Available Sites** field.
- Use the " **<<** " button to move *all* **Selected Sites** to the **Available Sites** field.

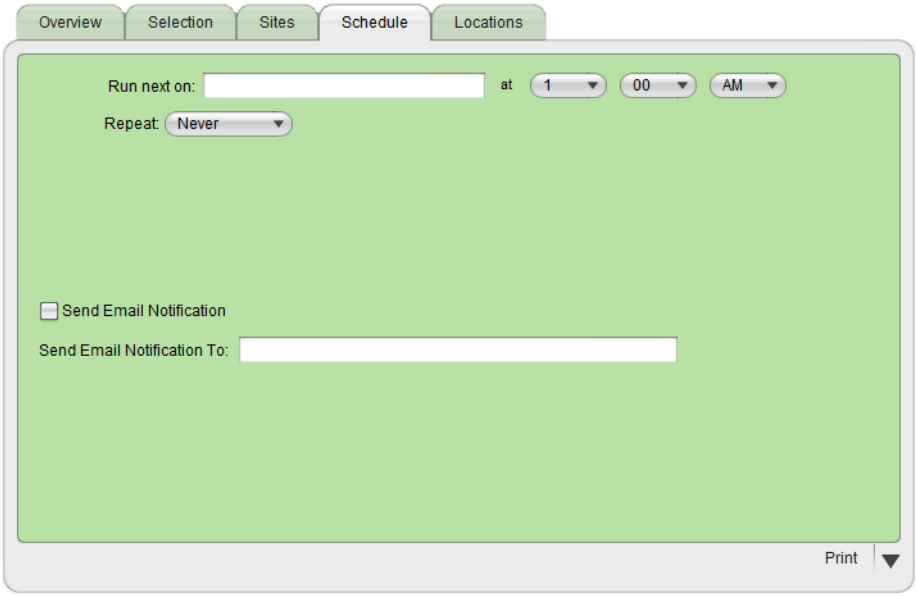
Schedule tab

The **Schedule** tab—useful only for **Saved** reports—is comprised of a fairly straightforward layout full of simple, time-saving features. For instance, let's say that you wanted to run a certain report every Friday at 5a.m. Using the **Repeat** drop-down menu, select **Weekly** and set the time drop-down menu(s) to **5** and **AM**. When the **Week(s) on** selection appears, select **Fri**.

If you want confirmation that the report is being performed at the indicated times and sent to the appropriate peoples, check the **Send Email Notification** box and provide email addresses in the **Send Email Notification To** field (e.g. *johndoe@examplelibrary.com*).

You can list more than one email address separated by commas:

johndoe@examplelibrary.com, janedoe@examplelibrary.com



Schedule Summary

Run next on—This field allows you to manually enter a date or select one from the **Date Picker** window (opened by clicking the calendar icon); this field adheres to COMPanion's **Adaptive Dates** *(see page 49)* standards.

Time—Use these three drop-down menus to select the hour, minute, and ante/post meridiem.

Repeat—You can select **Never**, **Daily**, **Weekly**, **Monthly**, **Yearly** from this drop-down menu. Secondary options may appear, depending on your selection. No secondary options appear for the **Never** or **Daily** selections as they are implied.

Every—This field, allowing only numbers, appears if you select **Weekly**, **Monthly**, or **Yearly** from the **Repeat** drop-down menu. This field allows you to specify how often you would like to repeat the report. For example, entering *2* under the **Weekly** selection will repeat the report every two weeks (i.e. biweekly). However, there are limits to this functionality; don't expect to create a "Haley's Comet" report that runs every 3,965 weeks (or 76 years). **Weekly** is limited to *100* weeks (roughly two years), **Monthly** is limited to *50* months (a little over four years), and **Yearly** is limited to *1* year.

Week(s) on—Select a day of the week from **Sun** through **Sat**.

Month(s) on—Select a day of the month from the **1st** through the **31st**; you can alternately check the **On The** box which allows you to run the report on the first, second, third, or forth day of the week.

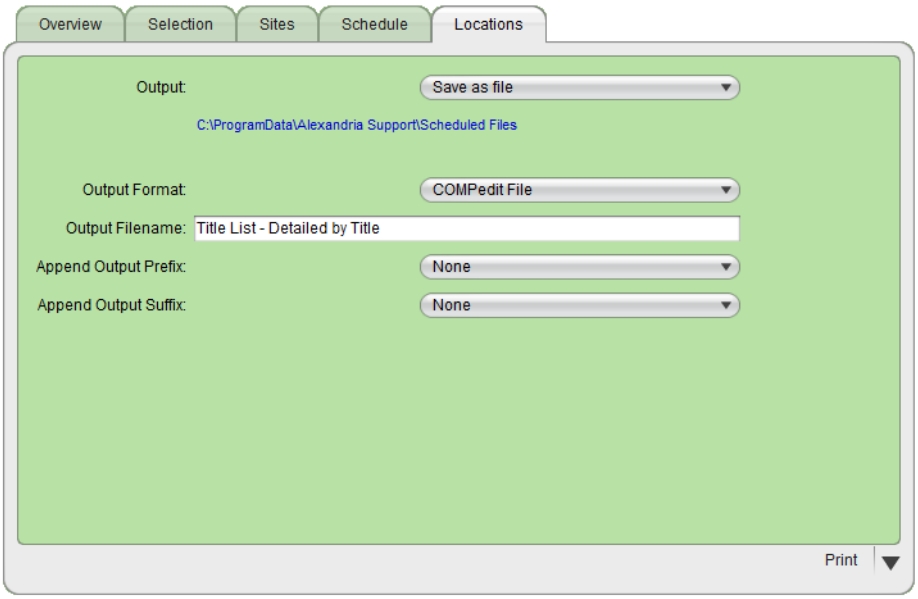
Every Year on—Select a month from **Jan** through **Dec**; when this is selected, the **On The** box is automatically checked. You will need to select the **1st**, **2nd**, **3rd**, or **4th** day of the week on which the report will run.

Send Email Notification—Check this box if you want to enable email notification, sent upon report completion.

Send Email Notification To—In this field, provide the email addresses that Alexandria will use to send notification emails when the report has finished; you can provide more than one email address separated by commas.

Locations tab

The **Locations** tab governs where finished reports are saved, sent, and stored (i.e. output).



By default, output is set to the **Operation Management** window for "ad-hoc" reports and the **Scheduled Files** folder of your main **Alexandria Support** folder (in "*.pdf*"—Adobe's portable document format) for **Saved** reports. You are allowed to choose different output locations and multiple recipients (via email) depending on your **Output** settings. The options available from the **Locations** tab change depending on which **Output** method you have selected. For example, if you choose **Send Report to FTP Server** from the **Output** drop-down menu, the **Username** and **Password** fields appear.

Locations Summary

Output—You can choose to output to **File**, **FTP**, **Email Attachment**, **Email Link**, or directly to the **Operation Queue**.

Username & Password—The **Username** and **Password** fields only appear (and are required) for uploading the report to an FTP site.

Output Format—Choose to save the file output as either **COMPedit File** (“*.vwp*”) or **Portable Document Format** (“*.pdf*”).

Output Filename—Set the name of the saved report file; you can append either the beginning or the end of the filename with current date and time or the Data Station serial number (see **Append Output Prefix**/**Suffix** below). You can indicate folder paths using “/” or “\\”.

Append Output Prefix—By selecting **Date & Time** you can choose to add the current date at the beginning of your output filename; by choosing **Data Station Serial #** you can choose to add your Data Station serial number at the beginning of your output filename (e.g. *20150107 500 Titles - Lifetime Usage.vwp*).

Append Output Suffix—By selecting **Date & Time** you can choose to add the current date at the end of your output filename; by choosing **Data Station Serial #** you can choose to add your Data Station serial number at the end of your output filename (e.g. *Titles - Lifetime Usage 20150107 500.pdf*).

Printing Reports

Clicking the **Print** button at the top of the **Reports** window opens the **Operation Management** and outputs a *".pdf"* for the selected report. This button simply prints the report to the screen and ignores any **Locations** settings.

However, the **Print** button at the bottom-right of the window is dynamic; its functionality depends on what you choose from the arrow menu located to the right of button. Making a selection from this menu will change the appearance and/or description of the lower-right **Print** button and retain those changes until manually adjusted.

Clicking the arrow reveals a selection menu containing the following dynamic options:

- **Print** *(to PDF)*—Prints the report to screen in *".pdf"* format and dynamically changes the **Print** button to **Print** *(to PDF)*.
- **Print as VWP**—Prints the report to screen in *".vwp*" format and dynamically changes the **Print** button to **Print as VWP**.
- **Print to Output**—The third selection from this menu (generally referred to as the **Print to Output** button for illustrative purposes) dynamically changes the **Print** button to match the **Output** setting of the **Locations** tab. In other words, this selection allows you to emulate—and deliver—the report according to the **Output** settings of the **Locations** tab. For example, let's say you've built a report that saves a *".pdf"* to your desktop. In this scenario, the **Output** selection of the report's **Locations** tab would necessitate the **Save As File** option. Therefore, if the **Print to Output** selection is made, **Save As File** would appear in place of the **Print** button. Clicking **Save As File** (i.e. **Print to Output**) will immediately run the report and save a *".pdf"* to your desktop.

All reports printed to *".pdf"* or *".vwp"* will open automatically; however, they are also saved to the **Alexandria Support** directory in a folder named **Operation Files**.

Every time you print a report, it will be documented in your **Transaction** log.

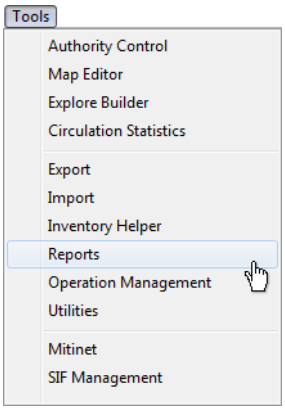
In Conclusion

In closing, take some time to explore the categories and subcategories and set up some favorite reports that you'd like to easily access and run. In the end, if you still have questions, remember you can always call or email COMPanion's Technical Support team at any time.

Remember, should you want nearly every setting the same for each report, you can duplicate a selected report, give it a new name, and make whatever changes you need (name, boolean, email recipients, etc).

If you decide to delete a report, find it in the **Saved** tab, select (i.e. highlight) it, and then choose **Delete Selected Report** (Cmnd/Ctrl+R) from the primary **Actions** menu. Additionally, you may remove *all* **Saved** reports in a particular category/subcategory by selecting **Delete All Reports Shown** from the primary **Actions** menu. Before deleting *any* reports, the program will ask you to confirm—just in case you accidently selected that option. COMPanion defaults can be restored by selecting **Restore Missing Defaults** from the primary **Actions** menu; however, custom-made **Saved** reports can not be restored.

Step-by-Step: Printing a Quick Report



- NOTE-

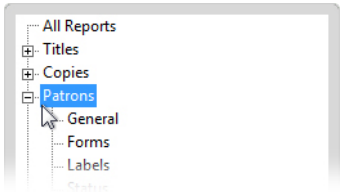
If you are more interested in creating a report with some semblance of permanence, you can follow the longer step-by-step guide on page page 197 to learn how to create your own, scheduled **Saved** reports.

You can quickly configure and print an "ad-hoc" report by following these general steps:

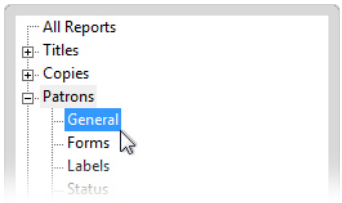
Step 1. Select **Reports** from the main **Tools** menu.

Step 2. The **Reports** window will appear; if necessary, you have the ability to modify report sites *(only available for Distributed Union users)* and selections.

Step 3. The left-hand side of the window is home to the report **Categories** pane, containing an organized list of all existing report categories (e.g. **Titles**, **Copies**, **Patrons**, **Circulation**, etc.). **Category** selections act as filters, reducing the number of results that appear in the **Reports** tab (of the **Report Selection** pane) on the right. Select a specific report category from this pane (e.g. **Patrons**).

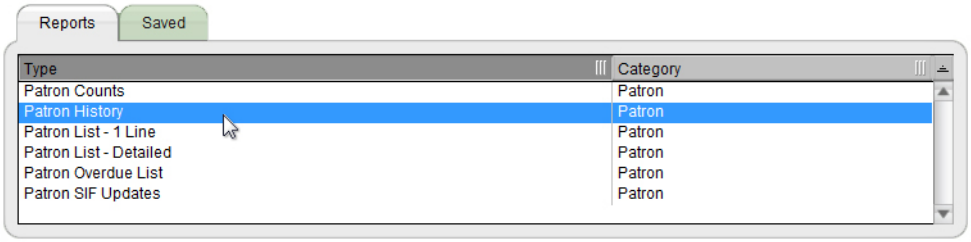


Step 4. Next, further refine your selection by choosing a subcategory; 'subcategories' are subsidiary sections of the main category that further narrow the focus of the report. For instance, the **Patrons** category contains the **General**, **Forms**, and **Labels** subcategories, among others. You are able to expand or contract associated subcategory sections by clicking on the icon located to the left of the main category name.



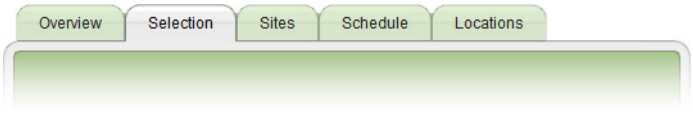
Step 5. Alternately, if you know *exactly* what you're looking for, you can skip the **Categories** pane altogether and just use the **Search** bar to filter the **All Reports** category selection to find your desired report (e.g. type `Patron History`).

Step 6. Once you have narrowed down your report selections (to only display relevant reports), choose the report you want to run from the **Reports** tab of the reports **Selection** pane.



Step 7. Selecting a report type from the reports **Selection** pane automatically populates the bottom half of the window (i.e. **Selected Report** pane) which contains report information in the **Selection** and **Sites** *(Distributed Union)* tab, among others. These tabs allow you to configure selection options for the report currently selected in the **Reports** tab above. Not only that, they contain essential selection criteria crucial to how information in the reports is ordered, organized, and presented.

Step 8. If necessary, use the **Selection** tab to build, format, and arrange the report according to your needs. You may set any combination of drop-down menus, tick optional checkboxes, and configure fields that limit or expound the information you want included in the report; these options differ from report to report depending on the selected report type.



Most (but not all) report types include an affiliated **Sort By** drop-down menu; select a sort order from the **Sort By** menu. The **Sort By** order determines the hierarchy of the information included in the report. Some selections sort by two values. A complete list of report sorting options can be located on Alexandria's Online Help.

After selecting the initial information and layout, you can further refine your report using boolean selections; adding selections can help to make your report more efficient and understandable.

The **Add Selection**, **Remove Selection**, **Add Site Selection**, and **Clear All Selec-**

tions buttons appear *above* the boolean list. When applicable, the boolean operator drop-down menu (i.e. *OR*, *AND*, and *AND NOT*) appears to the left of the **Select By** drop-down menu while any related selection fields appear to the right; all this is located *below* the boolean list.

The **Select By** drop-down menu is powerful; you can add as many *OR*, *AND*, and *AND NOT* boolean modifiers as you need to build the report and have it only include the information you require. The **Select By** options are processed in top-down order[1]. You won't usually have to worry about the default values provided in the boolean list; instead, you'll want to use the **Add Selection** button to add your own modifiers.

As you choose values from the selection drop-down menus, associated blank fields may appear, prompting you for information. One example would be the **Starting** and **Ending Date**[2] fields that appear when **Due Date** is chosen from the **Select By** drop-down menu, allowing you to provide a date range between a starting and ending value.

Another example would be the **Starting** and **Ending With** fields. If you enter *only* a **Starting With** value, the program will select all records that begin with the entered text. Entering a **Grade** value of *"*`GR1`*"* would select grades *"*`GR100`*"*, *"*`GR10`*"* and "`GR1B37`*"*.

To do an *exact* match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. Using **Grade** as our example, **Starting With** *"*`GR1`*"* and **Ending With** *"*`GR1 !`*"* (unless you really do have data named *"*`GR1 !`*"*).

A complete list of report selections options can be located on Alexandria's Online Help.

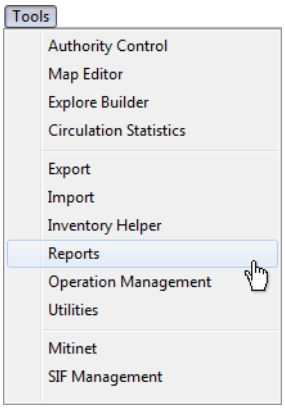
Step 9. If necessary, use the **Sites** tab *(only available for Distributed Union users)* to choose which collection(s) to draw the report information from. That means if you have multiple sites, you can generate reports for more than one library, or just your own library. The **Sites** tab is *not* available for all reports.

Step 10. When you are ready to print your finished report, click the **Print** button at the top of the window; this opens the **Operation Management** window and outputs a *".pdf"* for the selected report. Although it's not recommended, while the report is processing in the **Operation Management** window, you can perform other tasks, check items in and out or even prepare other reports. If necessary, click the **Cancel** button to stop the report from processing. If the **Operation Management or Report** window becomes hidden behind other windows, find it again using the **Windows** menu.

Step 11. All reports printed to *".pdf"* or *".vwp"* will open automatically; however, they are also saved to the **Alexandria Support** directory in a folder named **Operation Files**.

---

1. Using both **And** and **Or** operators at the same time *will* affect the results.
2. When you enter any type of specially-formatted information—such as dates—you can enter values in a wide range of formats. For example, you can enter the date December 1, 2015 as: *"Dec 1, 2015"* or *"12/1/15"* or *"12.1.15"* or *"12 1 15"*. If using the current year, you can just enter *"12/1"*. If the current month is December, you can just enter *"1"*. If you enter only a **Starting Date**, the program generates a "far future" date—which is the first of January, thirty years from the current date. If you enter only an **Ending Date**, the **Starting Date** defaults to January 1st, 1904 (i.e. the "far past"). If you don't enter any date, the **Starting Date** is set for one year in the past.



Step-by-Step: Creating a Saved Report

Follow these general steps to prepare your own report:

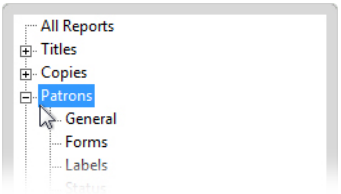
Open the Reports Window

Step 1. Select **Reports** from the main **Tools** menu.

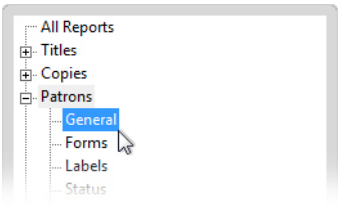
Step 2. The **Reports** window will appear; from here you have the ability to create or modify report names, selections, sites, schedule, and locations.

Choose the Report Category

Step 3. The left-hand side of the window is home to the report **Categories** pane, containing an organized list of all existing report categories (e.g. **Titles**, **Copies**, **Patrons**, **Circulation**, etc.). Category selections from the report **Categories** pane act as filters, reducing the number of results that appear in the **Reports** and **Saved** tabs (i.e. the report **Selection** pane) on the right. Select a specific report category from this pane (e.g. **Patrons**).



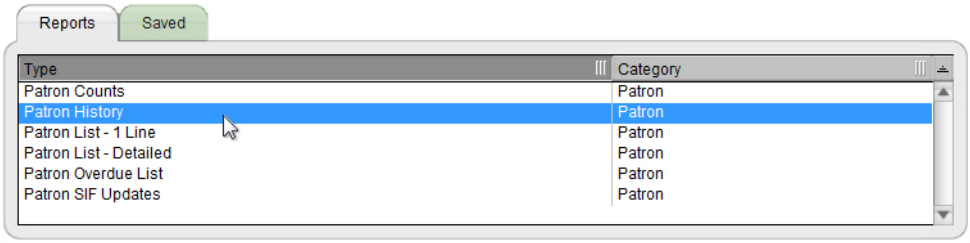
Step 4. Next, further refine your selection by choosing a subcategory; 'subcategories' are subsidiary sections of the main category that further narrow the focus of the report. For instance, the **Patrons** category contains the **General**, **Forms**, and **Labels** subcategories, among others. You are able to expand or contract associated subcategory sections by clicking on the icon ("> or +") located to the left of the main category name.



Step 5. Alternately, if you know *exactly* what you're looking for, you can skip the **Categories** pane altogether and just use the **Search** bar to filter the **All Reports** category selection to find your desired report (e.g. type `Patron History`).

Select the Report Type

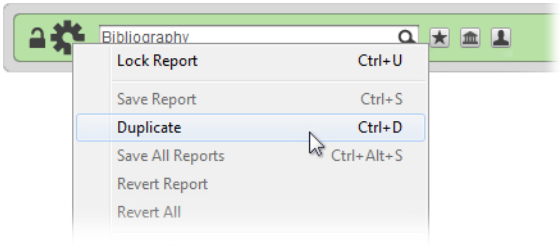
Step 6. Once you have narrowed down your report selections (to only show relevant reports), choose the report you want to perform from either tab of the report **Selection** pane.



Step 7. Selecting a report type from the **Reports** or **Saved** tab of the **Selection** pane automatically populates the bottom half of the window (i.e. **Selected Report** pane) which contains report information in the following tabs: **Overview**, **Selection**, **Sites** *(Distributed Union)*, **Schedule**, and **Location**. These tabs allow you to configure selection, schedule, and output options for the report currently selected from the **Selection** pane above. Not only that, they contain essential selection criteria crucial to how information in the reports is ordered, organized, and presented.

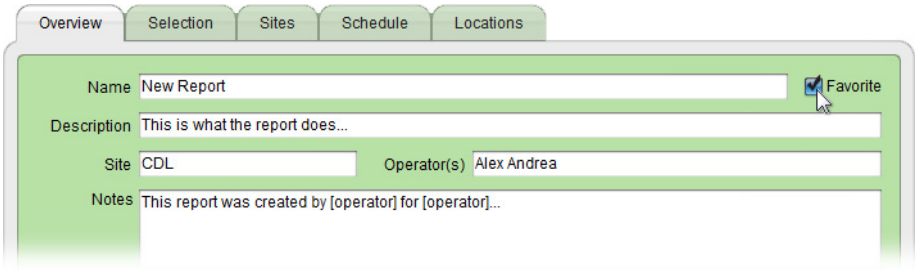
Step 8. If there *aren't* any reports in the **Saved** tab—or none that meet your needs—you can quickly create a new one. Use the report **Categories** pane to narrow your starting template selections from the **Reports** tab. When you find the report template from which you'd like to create a new **Saved** report, select (highlight) it and choose **Create New Saved Report (Cmnd/Ctrl+D)** from the primary **Actions** menu or at the bottom of the **Selected Report** pane; this will start you off under the **Selection** tab of the reports **Selection** pane (see below).

Step 9. If there *is* an existing **Saved** report that you wish to duplicate (or rename), select (highlight) it and choose **Duplicate (Cmnd/Ctrl+D)** from the primary **Actions** menu; this starts you off under the **Overview** tab of the reports **Selection** pane.



Overview tab

Step 10. The **Overview** tab provides a summary of what the report generates, what it selects and sorts by, whether or not it's scheduled, and where it outputs. This tab also allows you to **Name** the report, give it a succinct **Description**, and provide any general **Notes** you wish to add. If you'd like this report to be marked as one of your "favorites", check the **Favorite** box now. The **Site** and **Operator(s)** fields allow you to add valid operator(s) and site ID codes to the report.



Selection tab

Step 11. Use the **Selection** tab to build, format, and arrange each report (depending on the combination of drop-down menus, text fields, and checkbox options) according to your needs.

First, choose the type of report you would like to build. The **Report Type** drop-down menu is only available from the **Saved** tab and is limited to the category and subcategory for which the selected report belongs. For example, if you have chosen a **Circulation** (category) and **Charges** (subcategory) report, then only **Circulation** - **Charges** reports will be available from the **Report Type** drop-down menu.

After you choose the report type, you may set drop-down menus, tick optional checkboxes, and configure fields that limit or expound the information you want included in the report; these options differ from report to report depending on the selected **Report Type** (e.g. some reports have a **1-Line** and **Detailed** format).

Most (but not all) **Report Types** include an affiliated **Sort By** drop-down menu; select a sort order from the **Sort By** menu. The **Sort By** order determines the hierarchy of the information included in the report. Some selections sort by two values. A complete list of report sorting options can be located on Alexandria's Online Help.

After selecting the initial layout and information you want included in the report, you can further refine your selection criteria using boolean operators. Adding selections can help to make your report more efficient and understandable.

The **Add Selection**, **Remove Selection**, **Add Site Selection**, and **Clear All Selections** buttons appear *above* the boolean list. When applicable, the boolean operator drop-down menu (i.e. *OR*, *AND*, and *AND NOT*) appears to the left of the **Select By** drop-down menu while any related selection fields appear to the right; all this is located *below* the boolean list.

The **Select By** drop-down menu is powerful; you can add as many *OR*, *AND*, and *AND NOT* boolean modifiers as you need to build the report and have it only include the information you require. The **Select By** options are processed in top-down order[1]. You won't usually have to worry about the default values provided in the boolean list; instead, you'll want to use the **Add Selection** button to add your own modifiers.

As you choose values from the selection drop-down menus, associated blank fields may appear, prompting you for information. One example would be the **Starting** and **Ending Date**[2] fields that appear when **Due Date** is chosen from the **Select By** drop-down menu, allowing you to provide a date range between a starting and ending value.

Another example would be the **Starting** and **Ending With** fields. If you enter *only* a **Starting With** value, the program will select all records that begin with the entered text. Entering a **Grade** value of *"*`GR1`*"* would select grades *"*`GR100`*"*, *"*`GR10`*"* and "`GR1B37`*"*.

To do an *exact* match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. Using **Grade** as our example, **Starting With** *"*`GR1`*"* and **Ending With** *"*`GR1 !`*"* (unless you really do have data named *"*`GR1 !`*"*).

A complete list of report selections options can be located on Alexandria's Online Help.

Sites tab

Step 12. The **Sites** tab *(only available for Distributed Union users)* lets you choose which collections to draw the report information from. That means if you have multiple sites, you can generate reports for more than one library, or just your own library. The **Sites** tab is *not* available for all reports.

Schedule tab

Step 13. If you don't want to immediately perform the report, you can use the **Schedule** tab to set up a "one-time" or "repeating" operation. Provide a valid **Run Next On** and **Repeat** frequency in order to establish a schedule.

Step 14. If you want confirmation that the report is being performed at the indicated times and sent to the appropriate peoples, check the **Send Email Notification** box and provide email addresses in the **Send Email Notification To** field; you can list more than one email address separated by commas.

1.Using both **And** and **Or** operators at the same time *will* affect the results.
2.When you enter any type of specially-formatted information—such as dates—you can enter values in a wide range of formats. For example, you can enter the date December 1, 2015 as: *"Dec 1, 2015"* or *"12/1/15"* or *"12.1.15"* or *"12 1 15"*. If using the current year, you can just enter *"12/1"*. If the current month is December, you can just enter *"1"*. If you enter only a **Starting Date**, the program generates a "far future" date—which is the first of January, thirty years from the current date. If you enter only an **Ending Date**, the **Starting Date** defaults to January 1st, 1904 (i.e. the "far past"). If you don't enter any date, the **Starting Date** is set for one year in the past.

Locations tab

Step 15. The **Locations** tab governs where scheduled **Saved** reports are sent and stored. By default, output is set to the **Scheduled Files** folder of your main **Alexandria Support** folder, saved in "*.pdf*"—Adobe's portable document format. You are allowed to choose different output locations and multiple recipients (via email) depending on your **Output** settings.

Step 16. The options available on the **Locations** tab change depending on which **Output** method you have selected. Choose an **Output Format**; Adobe "*.pdf*" or COMPedit "*.vwp*". Use the **Output Filename** to name the report; you can append either the beginning or the end of the filename with current date and time or the Data Station serial number.

Saving and Printing Your Report

Step 17. When you are finished, click **Save All** to have a working, fully scheduled report that you won't have to worry about manually performing again for some time.

Step 18. If you would like to print your finished report as a "*.pdf*" click the **Print** button at the top of the window; this button simply prints the report to the screen and ignores your **Locations** settings. However, you can also use the **Print** menu at the bottom-right of the screen to **Print** *(as PDF)*, **Print as VWP**, or *"emulate"* the **Output** selections you've made from the **Locations** tab. For example, if you have the **Output** (in the **Locations** tab) set to **Save As File**, the **Print** menu will show "**Save As File**" as an available selection and will manually save the file to the directory specified in the **Locations** tab (which is configured in the main **Site Information** system preferences **Scheduled Events** tab).

Step 19. Clicking the **Print** button at the top (or sometimes bottom-right) of the window opens the **Operation Management** window and outputs a "*.pdf*" for the selected report. Although it's not recommended, while the report is processing in the **Operation Management** window, you can perform other tasks, check items in and out or even prepare other reports. If necessary, click the **Cancel** button to stop the report from processing. If the **Operation Management** or **Report** window becomes hidden behind other windows, find it again using the **Windows** menu.

Step 20. All reports printed to "*.pdf*" or "*.vwp*" will open automatically; however, they are also saved to the **Alexandria Support** directory in a folder named **Operation Files**.

Voilà! You've created and printed your own **Saved** report!

Notes:

Performing Utilities

- WARNING -
If you are *ever* encouraged to **Archive** before performing a utility, the correct response is *always* **Yes**.

- NOTE -
Remember, you must have first established your **Policies System Preferences** before you can perform utilities that migrate items or patrons to different policies.

Getting Started: Util-i-tize

Most **Circulation** window commands and operations are designed to modify individual pieces of data one entry at a time; utilities, however, can change large amounts of information in your database at once.

The **Utilities** window allows you to create your own set of essential utilities; we provide the general templates that help you build utilities that modify, transfer, remove, update, or verify the information you require. Once you've created custom utilities, there won't be a need to adjust the particulars very often.

The following sections provide a brief overview of the **Utilities** window and then guides you through the process of creating a utility.

The Utilities Window In More Detail

At first glance, faced with an abundance of tabs and large fields containing long lists of utility names, the **Utilities** window may seem somewhat overwhelming. *Don't panic!* Although it may look complicated, the **Utilities** interface behaves almost identically to that of the **Reports** window.

If you've been reading these chapters in sequential order, you should now have a firm understanding of how the **Reports** window operates, and thus, consequently, the **Utilities** window as well. However, if you yet haven't familiarized yourself with that area, we advise that you to stop now, return to the chapter detailing the **Reports** window and then return here afterward. Once you have reviewed the **Reports** section in detail, you should have a solid foundation and innate understanding of the workings of the **Utilities** window. If you require comprehensive coverage of the **Utilities** window and all it's associated categories, tabs, and selectable options, please review the "*Utilities*" section(s) of Alexandria's Online Help.

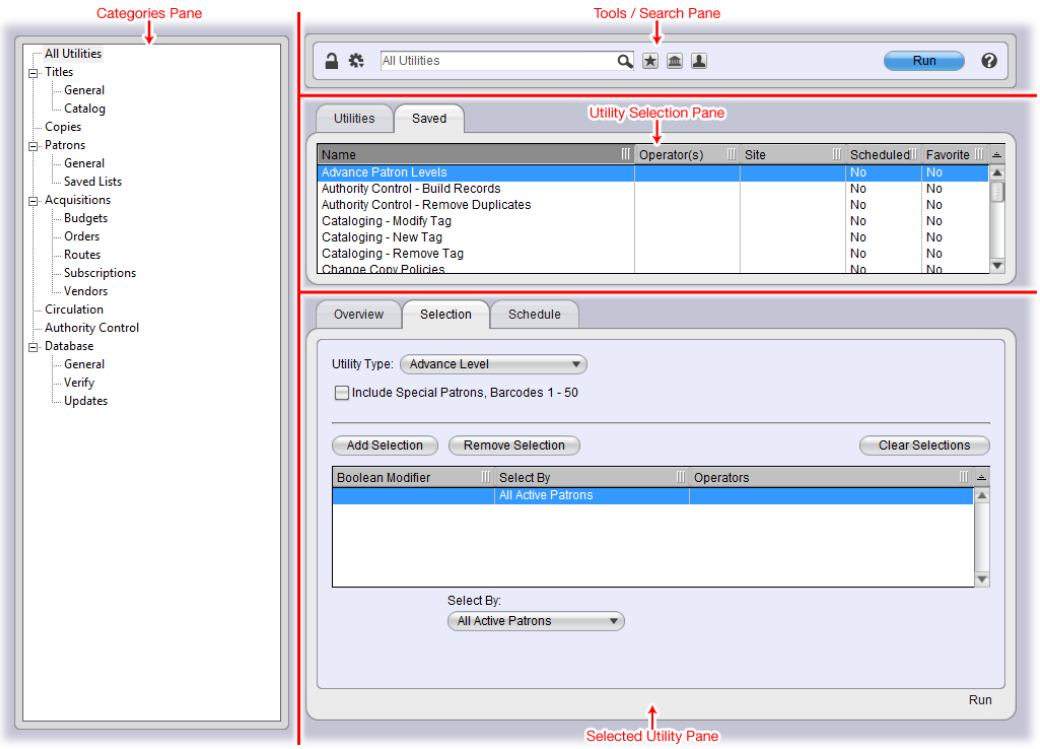
The **Utilities** window was designed with simplicity in mind; placing everything in a single, easily navigable window that allows you to quickly find, modify, create, and run utilities.

Additionally, the **Utilities** window allows you to customize utilities so that they only modify, clear, or clean required information: records of interest, title/copy policies, patron histories, and all types of acquisitions. You can also schedule utilities to rebuild, update, or verify your database, etc.

In order to become a utilities wizard, there are only three essentials you need to understand: category searching, utility templates, and creating custom utilities.

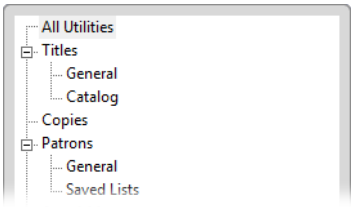
The **Utilities** window was developed using the familiar three-panel layout found in many of the application's main management windows.

- The left-hand side of the window is home to the utility **Categories** pane, containing an organized list of all existing utility categories (e.g. **Titles**) and subcategories (e.g. **Catalog**). Selections from this pane act as filters, allowing you to narrow your focus and show only relevant utilities.
- The upper-right section of the window contains the utility **Tools**/**Search** pane along with the **Utility Selection** pane (i.e. the **Utilities** and **Saved** tabs), which allow you to select the specific utility you would like to view, modify, or run.
- The **Selected Utility** pane—the bottom-right area of the window—contains options for the highlighted (i.e. selected) utility, housed in the following tabs: **Overview**, **Selection**, and **Schedule**.



Utility Category Filters

The first step in performing useful utilities is picking the proper utility category. The utility **Categories** pane on the left-hand side of the window is a collection of categories and subcategories that can reduce the number of results that appear in the **Utility Selection** pane (i.e. the **Utilities** and **Saved** tabs) on the right. You are able to expand or contract associated subcategory sections by clicking on the icon located to the left of the main category name. Selecting (highlighting) one of the main category (or subcategory) names (e.g. **Titles**) will reveal all of the utilities available for that category (or subcategory). For example, if you want to run an **Advance Grade** utility, you can't do it with the **Circulation** category selected—that's a **Patrons** (category) utility that you'll find under the **General** subcategory. Selecting the **All Utilities** from the top of the categories list will populate the **Utilities** and **Saved** tabs with *all* available utility options.



For a full and descriptive list of all utility categories and subcategories, please review the "*Utilities*" section(s) of Alexandria's Online Help.

Utilities Tools / Search Pane

The greater half of the **Utilities** window is mostly dedicated to the currently selected utility (filtered using the utility **Categories** pane on the left), which contains all of the utility's configurable options and editable fields.

Topping this section of the window is a long, rectangular area containing the **Save All** and **Revert All** buttons[1], the **Run** button, the **Online Help** icon, the **Lock**/**Unlock** icon and the primary **Actions** icon which performs functions related to the selected utility.

For a full and descriptive list of all **Tools**/**Search** pane options, including **Actions** menu selections, please review the "*Utilities*" section(s) of Alexandria's Online Help.

1.The **Save All** and **Revert All** buttons are conditional and only appear when a changes have been made to various fields of an export selected from the **Saved** tab

Utility Selection Pane

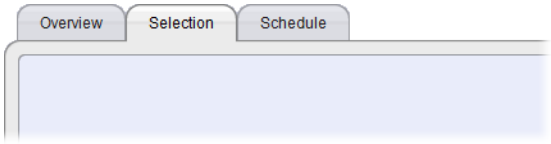
Directly below the current utility **Tools / Search** pane is the utility **Selection** pane, home of the **Utilities** and **Saved** tabs. Remember, the utilities that appear in the **Utilities** and **Saved** tabs directly relate to the category (or subcategory) that is selected from the utility **Categories** pane on the left-hand side of the window and/or to the text that is entered into the **Search** bar.

- The **Utilities** tab houses the complete list of *all* available utility types and their related categories; essentially, an exhaustive utility depository, containing every existing utility template—used for quickly performing an "ad-hoc" or operator-created (and conveniently saved) utility for future use. These templates store no customized selection settings and should not be confused with default (or operator-created) **Saved** utilities. If you haven't been able to locate the utility template you are looking for, chances are you will find it here.
- The **Saved** tab contains a list of previously created utilities; these can be system defaults or operator-created. Individual **Saved** utilities can be "favorited" by checking the **Favorite** box in the **Overview** tab; if the check is removed, it will no longer be marked as a "favorite" utility.

For a more complete description of the **Utilities** and **Saved** tabs, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

Selected Utility Pane

The lower-right area of the **Utilities** window is home to the following tabs: **Overview**, **Selection**, and **Schedule**. These tabs allow you to configure selection and schedule options for the utility currently selected in the **Utilities** or **Saved** tab. Not only that, they contain the essential selection criteria that is crucial to how utilities are performed.



Be sure to always **Save All** changes you make to the **Saved** utilities in the **Utilities** window so that you're guaranteed to have full, working, and scheduled utilities.

Should you want nearly identical settings for each utility, you can **Duplicate** (Cmnd/Ctrl+D) them, give them a new name, and make whatever modifications you require (name, boolean, email, etc).

For a more complete description of the **Overview**, **Selection**, and **Schedule** tabs, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

Performing Utilities

- NOTE -
If you are *ever* encouraged to **Archive** before performing a utility, the correct response is *always* **Yes**.

Clicking on the **Run** button at the top (or sometimes bottom-right) of the window opens the **Operation Management** window and performs the selected utility.

Every time you run a utility, it will be documented in your **Transaction** log.

For a step-by-step guide on how to successfully perform a utility, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help

In Conclusion

In closing, take some time to explore the categories and subcategories and set up some favorite utilities that you'd like to easily access and run. In the end, if you still have questions, remember you can always call or email COMPanion's Technical Support team at any time.

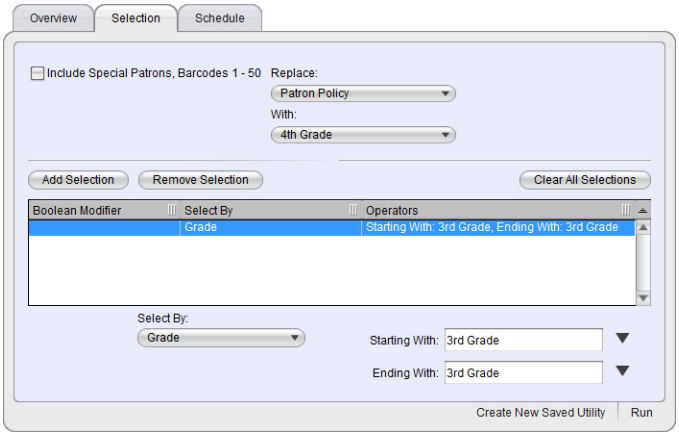
Remember, should you want nearly every setting the same for each utility, you can duplicate a selected utility, give it a new name, and make whatever changes you need (name, boolean, email recipients, etc).

If you decide to delete a utility, find it in the **Saved** tab, select (i.e. highlight) it, and then choose **Delete Selected Utility** (Cmnd/Ctrl+R) from the primary **Actions** menu. Additionally, you may remove all Saved utilities in a particular category/subcategory by selecting **Delete All Utilities Shown** from the primary **Actions** menu. Before deleting any utilities, the program will ask you to confirm—just in case you accidently selected that option. COMPanion defaults can be restored by selecting **Restore Missing Defaults** from the primary **Actions** menu; however, custom-made **Saved** utilities can not be restored.

Again, for a more complete description of the **Utilities** window, please review the corresponding "*Utilities*" section(s) of Alexandria's Online Help.

Moving Patrons to a New Policy

Now that you've set up your new **Patron** policies, you can use the **Utilities** window to move them over. If your new policies are set up by grade, this will be very easy to accomplish. If you are using some other identifier (e.g. **Homeroom**), find the most common value for those people and use it as your **Select By** criteria. The example pictured below demonstrates how to switch patrons on the **3rd Grade** policy to the **4th Grade** policy using **Grade** as the **Select By** criteria.



To change the default policy for a group of selected patrons:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select (highlight) **Patrons** from the utility **Categories** pane on the left-hand side of the **Utilities** window.

Step 3. Next, choose the **General** subcategory located directly below.

Step 4. From the **Utility Selection** pane, choose the **Replace Information** utility type.

Step 5. Under the **Selection** tab of the **Selected Utility** pane, set the **With** drop-down menu (e.g. **3rd Grade**).

Step 6. Next, set the **Select By** to the desired criteria (e.g. **Homeroom**, **Grade**, **Policy**).

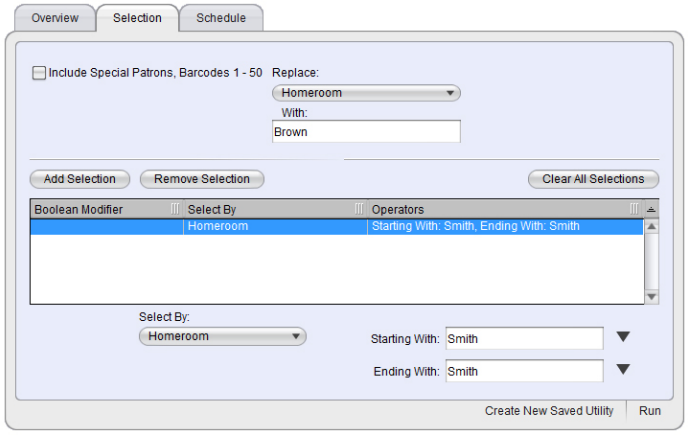
Step 7. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**).

Step 8. Click **Run**. Remember, if you are asked whether or not you want to archive, the answer is *always* **Yes**.

Once you have switched all your patrons to new policies, statistics will begin to be kept according to those policies. Prior statistics *can not* and *will not* be changed.

Moving Patrons to a New Homeroom

If the patron information you receive from your SIS (Student Information System) does not include the homeroom, use this utility to change the default homeroom for a group of selected patrons:



To change the default homeroom for a group of selected patrons:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select (highlight) **Patrons** from the utility **Categories** pane on the left-hand side of the **Utilities** window.

Step 3. Next, choose the **General** subcategory located directly below.

Step 4. From the **Utility Selection** pane, choose the **Replace Information** utility type.

Step 5. Under the **Selection** tab of the **Selected Utility** pane, select **Homeroom** from the Replace drop-down menu.

Step 6. Next, enter the name of the homeroom in the **With** drop-down menu (e.g. **Brown**).

Step 7. Next, set the Select By to the desired criteria (e.g. **Homeroom**, **Grade**, **Policy**).

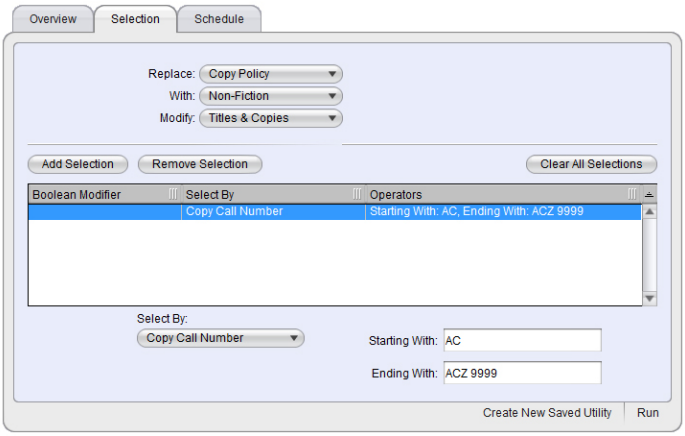
Step 8. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**).

Step 9. Click on **Run**. Remember, if you are asked whether or not you want to archive, the answer is *always* **Yes**.

Moving Items to a New Policy

Now you are ready to switch your items from the generic **Standard Item** policy to a more specific policy.

Performing this utility will be quite easy since you've probably used call number ranges or prefixes (such as **FIC**) as the basis for your new **Item** policies. The example pictured below demonstrates how to switch items within a specific call number range to the corresponding policy.



To switch items to a new item policy:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select (highlight) **Copies** from the utility **Categories** pane on the left-hand side of the **Utilities** window.

Step 3. From the **Utility Selection** pane, choose the **Replace Information** utility type.

Step 4. Under the **Selection** tab of the **Selected Utility** pane, set the **With** drop-down menu (e.g. **Non Fiction**).

Step 5. Next, set the **Select By** to the desired criteria (e.g. **Copy Location**).

Step 6. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**). For example, if you are doing a Dewey Range, use the beginning call number and the ending call number (e.g. `000 - 099.99999`).

Step 7. Click on **Run**. Remember, if you are asked whether or not you want to archive, the answer is *always* **Yes**.

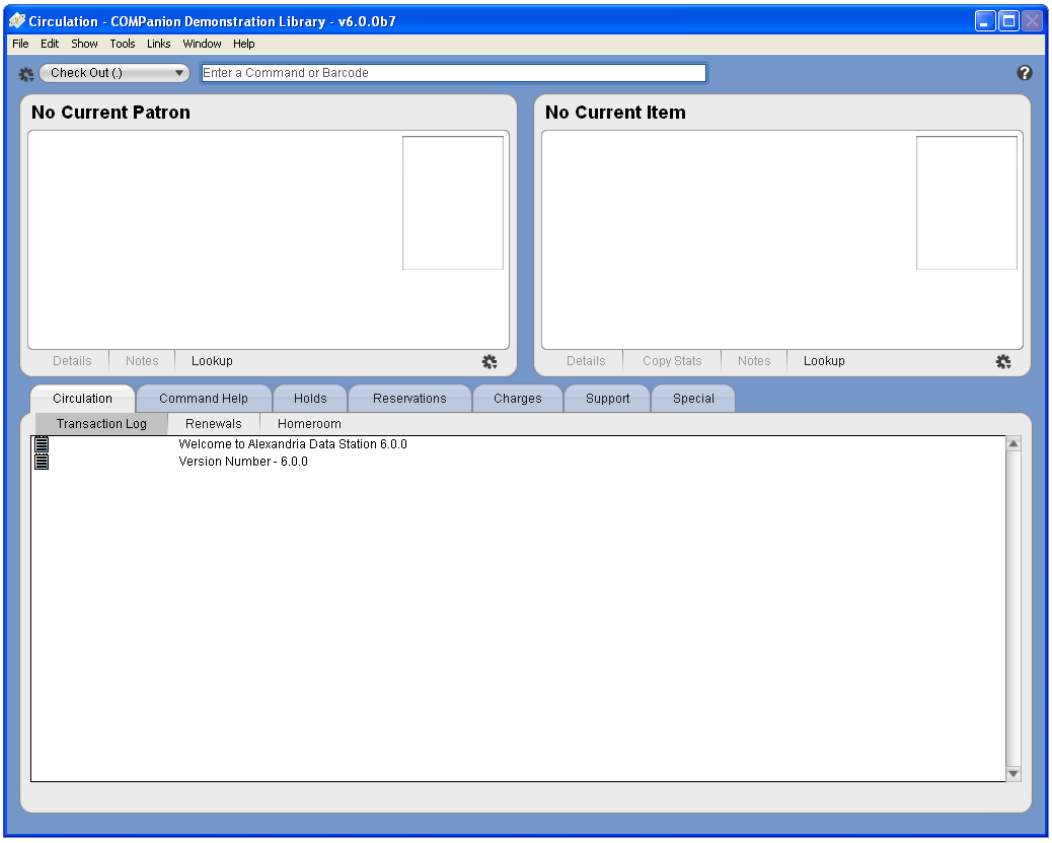
Once you have switched all your items to the new policy, statistics will begin to be kept according to these policies. Prior statistics *can not* and *will not* be changed.

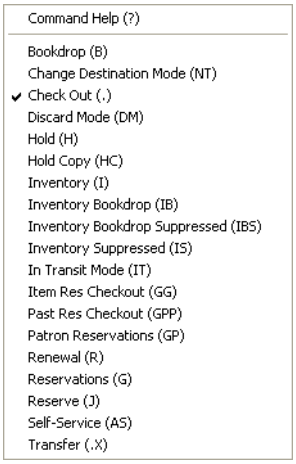
Circulation Window

Use the **Circulation** window (the main window of the District and Librarian Workstation) to perform library transactions. You can also issue books, place hold requests and reservations, process fees, fines, payments, and renew books. You can also perform special functions such as inventory, cataloging, record updating and viewing.

Use one of the two methods to bring the **Circulation** window into focus.

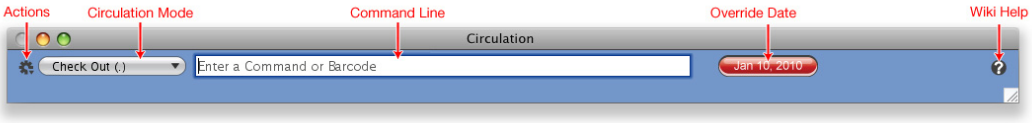
- Select **Circulation** (Cmnd/Ctrl+T) from the main **Show** menu.
- Select **Circulation** from the **Windows** menu.


Circulation - COMPanion Demonstration Library - v6.0.0b7
File Edit Show Tools Links Window Help
Check Out (.)
Enter a Command or Barcode
No Current Patron
Details Notes Lookup
No Current Item
Details Copy Stats Notes Lookup
Circulation Command Help Holds Reservations Charges Support Special
Transaction Log Renewals Homeroom
Welcome to Alexandria Data Station 6.0.0
Version Number - 6.0.0



Modes, Commands and Help

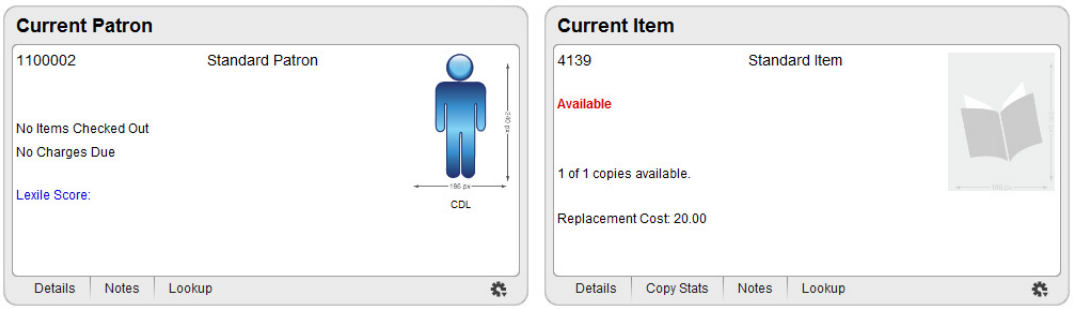
The top section of the **Circulation** window allows you to select and enter commands that apply to the active **Circulation Mode** of the command line.



- A **Circulation Mode** is simply a function for which you may want to process many patrons or items. For example, **Bookdrop**, **Check Out**, **Inventory**, **Hold**, and **Renew** are all modes.
- The **Command Line** is where you enter a barcode for a patron or item, or you may enter a circulation command *(see page 223)*. If you enter *only* a barcode, the current **Circulation Mode** (shown to the left of the command line) will determine what action is performed.
- Click the round **Help** ("?") button at the top of the **Circulation** window to open your default web browser to the main page of Alexandria's Online **Help**.

Current Patron and Current Item Information

Just below the top portion (see "**Modes, Commands, and Help**" on the previous page for more information) of the **Circulation** window is where general information about the current patron and current item is displayed.



- NOTE-

Many Alexandria functions depend on the current patron or item. For example, you must have a current patron to check out, hold, or reserve an item.

- Depending on your system preferences, the current patron section can display the patron's current Lexile score and Reading Level; also shown are the number of items checked out and fines or credits they have accrued.
- If available, click the **Details** button in the current patron/item panes to view detailed information about the patron/item.
- If available, click the **Notes** button in the current patron/item panes to view notes entered for a particular patron/item. You may provide the notes for a patron in the **Notes** tab of the **Patrons** management window *(see 257)*. You provide notes for an item in the **Copy Notes** tab of the **Items** management window *(see 239)*.

  You can also select **Show Patron/Item Details** from the **Circulation** window's top-left **Actions** drop-down menu to view the same information as the **Details** button.

  Alternately, you can select **Notes** from the **Actions** drop-down menus located in the bottom-right corners of both the **Current Patron** and **Current Item** panes.
- If the **Current Item** is a title copy, you can view individual **Copy Stats** by clicking the subtab. This is the same as clicking the **Copy Stats** tab of the **Item Management** window (**Copy Information** tab).
- Click the **Lookup** subtab opens the **Patron/Item Lookup** window, respectively.
- If you have vendors active in the **Vendors** window, a **Vendor** icon will appear to the left of the **Actions** drop-down menu.

Using the Circulation Window

This section describes how to perform basic operations in the **Circulation** window in order to complete transactions in your library.

Using the Command Line

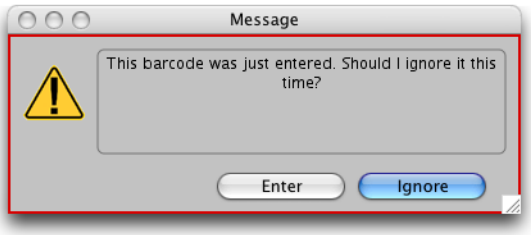
There are several ways to use the command line.

1) Enter a barcode.

You may enter a barcode manually by typing the number and pressing `<enter>`; or you may scan a barcode using a barcode reader.

When you enter a barcode, the action that takes place depends on the current **Circulation Mode** (which is displayed to the left of the command line). For example, if your current **Circulation Mode** is **Check Out (.)** and you enter barcode "`13456`", item 13456 is checked out to the current patron.

If you enter the same barcode number twice in a row, this warning message appears.



- NOTE-

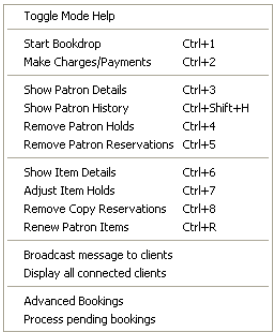
When you enter barcodes via portable scanners, Alexandria will ignore duplicate entries that appear side by side.

- **Enter a command and a barcode.**
  For actions other than those contained in the **Circulation Mode** drop-down menu, enter a command followed by the barcode and press `<enter>`. Doing so will apply that action to the barcode you enter. It does not change the **Circulation Mode**. Therefore, if you're in **Check Out (.)** mode, entering the command of "`B 13456`" performs a bookdrop on item 13456.
- **Enter a command without a barcode.**
  If you enter a command without a barcode, the current **Circulation Mode** will change. For example, if you enter "`H`" and press `<enter>`, the **Circulation Mode** is set to **Hold**. You can then enter (or scan) a barcode for each item that you want placed on hold for the current patron.

- NOTE-

An equal sign "=" is used as a shortcut for the current item barcode. For example, if you have a current patron, "`H=`" will place a hold on the current item.

Using the Actions Menu



Additional circulation commands are available from the **Actions** menu(s). These menus appears throughout the **Circulation** window. You can either select a command directly from these menus or use the hot-keys (located in the right-hand column of the **Actions** menu) to execute commands.

Some of the commands in these menus require a current patron or current item. For example, you must have a current item to select **Copy Stats**.

The **Actions** menu(s) show available commands as discernible text. For example, if the current patron does not have any reserves, the **Remove Patron Holds** and **Remove Patron Reservations** selections are grayed-out in the menu and therefore, non-selectable.

The following commands are available from the **Actions** menu:

Toggle[1] Mode Help—This Alexandria-only selection toggles a real-time **Circulation Mode** drop-down menu help section, which explains what each **Circulation Mode** from the drop-down menu does.

Start Bookdrop (Cmnd/Ctrl+1)—Sets the current **Circulation Mode** to **Bookdrop**. In **Bookdrop** mode, you enter barcodes for items you want to check in. This option will toggle between **Start Bookdrop** and **Start Check In/Out** mode.

Start Check In/Out (Cmnd/Ctrl+1)—Sets the current **Circulation Mode** to **Check Out (.)**. This menu will toggle between **Start Bookdrop** and **Start Check In/Out** modes.

Make Charges/Payments (Cmnd/Ctrl+2)—Opens the **Charges** tab on the **Circulation** window; you may add or remove fines, accept payments for acquired fines, and issue refunds for payments made. You must have a current patron to select this mode.

Show Patron Details (Cmnd/Ctrl+3)—Shows the current patron's complete details; including all transactions, fines, requests, and so forth. You must have a current patron to select this option. Performs the same function as clicking the current patron **Details** button.

Show Patron History (Cmnd/Ctrl+Shift+H)—Shows the current patron's complete history; including all transactions, fines, requests, and so forth. To select this option, you must have a current patron who has the **Keep Patron History** (**Statistics** tab) box checked in their patron record *(for more information, please review the "Patron Management" sections of Alexandria's Online Help)*.

Remove Patron Holds (Cmnd/Ctrl+4)—Opens the **Holds** tab on the **Circulation** window and shows which items the current patron has on hold. You must have a current patron with hold requests to select this option.

Remove Patron Reservations (Cmnd/Ctrl+5)—Opens the **Reservations** tab on the **Circulation** window and shows items with reservations pending for the current patron. You must have a current patron with reservations to select this option.

1.In technical terms, toggle means "to alternate between two or more electronic, mechanical, or computer-related options, usually by the operation of a single switch, drop-down menu, or keystroke (e.g. *toggled back and forth between two windows on the screen*)."

Show Item Details (Cmnd/Ctrl+6)—Shows the current item's complete details; including the status for all copies belonging to that title. You must have a current item to select this command. Performs the same function as clicking the current item **Details** button.

Adjust Item Holds (Cmnd/Ctrl+7)—Shows all patrons who have hold requests for the current item. You can remove a patron request from the queue or change the order. You must have a current item with pending hold requests to select this option.

Remove Copy Reservations (Cmnd/Ctrl+8)—Shows all forward reservations for the current item. To remove reservation requests, click on the reservation and click on **Remove Reservation**. You must have a current item with reservations to select this option.

Renew Patron Items (Cmnd/Ctrl+R)—Shows everything currently checked out to the current patron. Either click the **Renew All** button to renew *all* items or select (highlight) certain items to renew and click the **Renew** button. The current patron must have items checked out to select this option.

Broadcast Message to Clients—A query window will appear with a text box for entering and sending messages to other Librarian and Researcher Workstations connected to the main Data Station. This message will only appear to currently-connected clients.

Open Transaction Log—This selection opens the current **Transaction Log** in a VWP document, similar to entering " +++ " into the command line.

Open Transaction Log Folder—This selection will open the directory where all your locally archived log data is stored.

On Macintosh OSX machines, this folder is located in the following directory:
Hard Drive > **Users** > **Shared** > **Library** > **Application Support** > **Alexandria Support** > **Log**

On a Windows XP, 2K, or 2K3 machine, the log folder should be located here:
Hard Drive *(typically C:)* > **Documents and Settings** > **All Users** > **Documents** > **Alexandria Support** > **Log**

On a Windows 7 and Vista machine, the log folder should be located here:
Hard Drive *(typically C:)* > **ProgramData** > **Alexandria Support** > **Log**

Advanced Bookings—Every day that reservations begin, an administrator-level operator should select the **Advanced Bookings** option from the **Circulation** menu; for more information on why this should be done, review the "Advanced Bookings" section of Alexandria's Online Help.

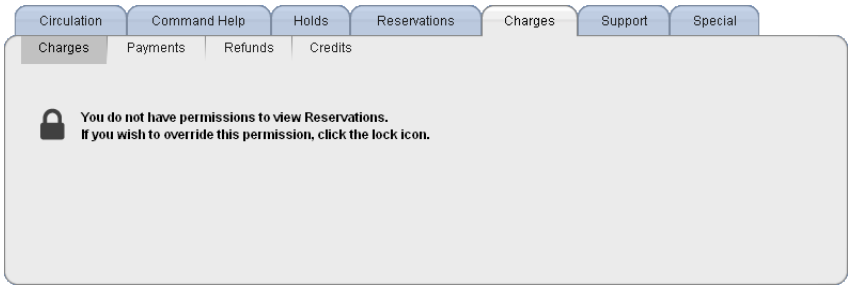
Process Pending Bookings—When you select the **Process Pending Bookings** menu option, Alexandria checks to see if any unavailable items have recently become available. If they have, they're automatically assigned to the requesting patron(s).

Circulation Window Tabs

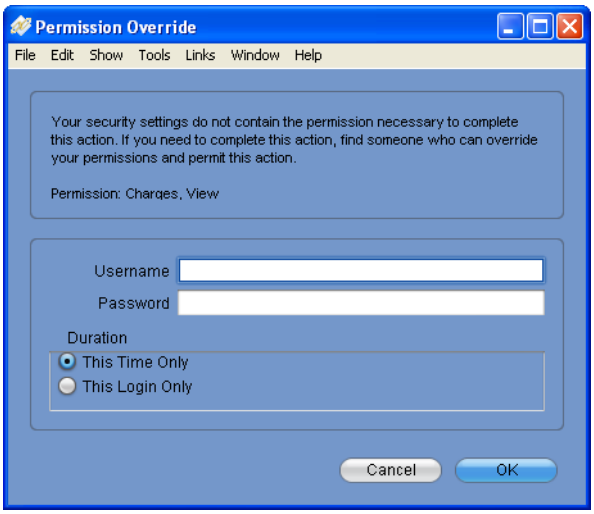
The bottom half of the **Circulation** window contains a series of tabs that are helpful for daily circulation activities and the management of your library information *(these are discussed in more depth on the "Circulation tabs" section of Alexandria's Online Help)*.

Permission Override

If the operator who is currently logged into Alexandria doesn't have the proper authority to change or access the options within a particular **Circulation** tab, then the **Permission Override** lock icon and a brief description (as shown below) will appear.



To override the current operator's security, click on the lock icon. Doing so will open the **Permission Override** window. When the **Permission Override** window appears, you are required to input an appropriate **Username** and **Password**[1] in order to access Alexandria as the new operator.


Permission Override
File Edit Show Tools Links Window Help
Your security settings do not contain the permission necessary to complete this action. If you need to complete this action, find someone who can override your permissions and permit this action.
Permission: Charges, View
Username
Password
Duration
This Time Only
This Login Only
Cancel
OK

1.If a password was not supplied when creating a new user in the **Add Operator** window *(141)*, then this field will not be required.

If you are the Alexandria operator without the necessary security permissions to complete a required action, you must find someone who has the authority to override your permissions and who is willing to permit the action.

From the **Duration** section of the **Permission Override** window, choose the duration of the operator override. You can override the specific action for one time only, or for the duration of the current login.

This Time Only—Checking this radio button will allow the operator to perform the otherwise locked Alexandria function for *one time* only. The moment that the operator exits the window, the function will be re-locked and the lock icon will reappear the next time the current operator attempts to access this feature. For example, if you allow your operator to access Alexandria **Charges** using the **This Time Only** option, then they won't be able to open the **Charges** tab again after it has been closed.

This Login Only—Checking this radio button will temporarily unlock the specified Alexandria function for the current operator's entire session. The selected window will remain unlocked until the next time Alexandria is restarted. For example, if you allow your operator to access Alexandria **Utilities** using the **This Login Only** option, then operators will be able to access the **Utilities** window (even after this window has been closed) for the duration of the current operator's login.

After you have provided your username, password, and specified a duration, click **OK** to return to Alexandria.

The username that was used to override the permission will be recorded to the **Transaction log**.

Special/System Patrons

There are several *special* patrons that Alexandria uses to track items with unique statuses, such as lost, archived, or out-for-repair. For example, to track items that have been lost, you would check them out to the **Lost Copies** patron (barcode #1).

Special patrons use the **System** policy, which has no restriction on the number of items that may be checked out at one time. You can check items out to special patrons just as you would with any other patron.

Here are Alexandria's *special* patrons:

Lost Copies (barcode 1)—To keep track of copies that have been lost, check them out to this patron. Unlike other assets, a copy that is checked out to the **Lost Item** patron does not have its inventory date renewed. If the copy is ever found, simply check it in and it's available for circulation again.

If a copy is already checked out a *real* patron, checking it out to the **Lost Item** patron causes a window to appear so you can charge a fine to the patron who has lost the item. The lost copy will appear on several patron status/details reports.

Although you may permanently remove copies from the Alexandria system when it's lost, lost copies are quite often found again later. Checking a copy out to the **Lost Item** patron makes it easier to return it to the system because you simply check the copy back in when it's found.

Using the **Lost Copies** patron also makes it easy to keep track of which copies have been lost so you can order new copies.

There are **Utilities** available to remove lost copies according to your policies and the utility selection criteria you provide.

Discarded Copies (barcode 2)—To track copies in the library that are not circulated, but have not yet been permanently removed, check them out to this patron. To return a discarded copy back to "in-stock," simply check it in.

To permanently remove discarded copies, use the corresponding **Item Utility**.

For more information on checking copies out to the **Discarded Item** special patron, please review *(237)* of this guide.

For Library Use (barcode 3)—To keep copies available for use *only* within the library, check the items out to this patron. For example, you may want to keep holiday books available in the library and not allow them to be checked out during the holiday season. Check these items out or place a reservation on them using the **For Library Use** patron.

On Repair (barcode 4)—To keep track of copies sent for repair and not available to patrons, check them out to this patron. When the item has been repaired and returned, check them in to make them available again.

On Order (barcode 5)—To keep track of copies on order, add them to your collection immediately after you place your order and then issue them to this patron. Enter an override date that matches the scheduled delivery date for these items. When you receive these items, check them in to make them available.

Archived Copies (barcode 6)—To archive certain copies and make them unavailable to patrons, check them out to this special patron. For example, issue items to this patron if they are kept in a special room and not generally available for circulation.

Unknown (barcode 8)—Used for copies with special circumstances or whose status you do not know (e.g. items on display, set aside, or temporarily misplaced that you know aren't permanently missing).

In Transit (barcode 9)—To keep track of copies that are in transit, assign them to this patron. When you receive these items, check them in to make them available.

System Administrator (barcode 10)—This special operator is your system default **District Administrator**[1] This special operator is also responsible for enabling and disabling security. Although you are not allowed to remove or change the **Security Group** of this operator, you are allowed to change it's **User ID** and **Password**.

Security is *off* by default when the **Password** for this special operator *(barcode 10)* matches your Alexandria **Serial Number**. When security is turned *off*, the **Log In** window does *not* appear and any operator who attempts to launch the software will be automatically logged in.

In order to *enable* security (which we *strongly* recommend), you *must* use the **Reset Password** button to change the default password for this special **District**-level operator to something other than the application **Serial Number**[2]. COMPanion suggests using a strong, secure password by mixing different types of characters; use some uppercase letters along with lowercase letters, numbers and even special characters such as "&" or "%".

Reasons For Creating Your Own Special/System Patrons

You can create and remove your own *special* patrons to track items with a unique status as needed for your library. Use barcodes 30-50 for special patrons (barcodes 20 and under are exclusively reserved for COMPanion use). These patrons are automatically assigned the **System** policy, which does not restrict the number of copies they can check out.

The following are examples of uses for special patrons you create:

- Instead of using the **For Library Use** patron to reserve holiday books, create a "holiday" patron and check out seasonal books to this patron.
- Instead of using the **On Repair** patron, create a special patron for each vendor that repairs your items. When you send an item to that vendor, check it out to them for the period of time they will have the item.
- Instead of using the **On Order** patron, create a special patron for each vendor from whom you order items. When you order items from that vendor, check them out to that vendor and enter an override date that matches the scheduled delivery date.

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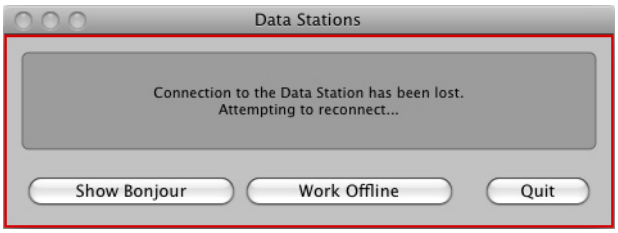
1. Although COMPanion does *not* recommend it, as long as security is enabled and you know this special operator's backdoor password, you are *not* required to have any other **Administer**-level operators.
2. If you would like to re-disable security, change this special operator's **Password** *back* to the application's **Serial Number**.

Offline Mode

Alexandria provides an **Offline Mode** for Librarian Workstations. Alexandria's **Offline Mode** offers additional peace of mind for operators when things go wrong, such as a network failure, especially in systems where longer network distances make failure more feasible.

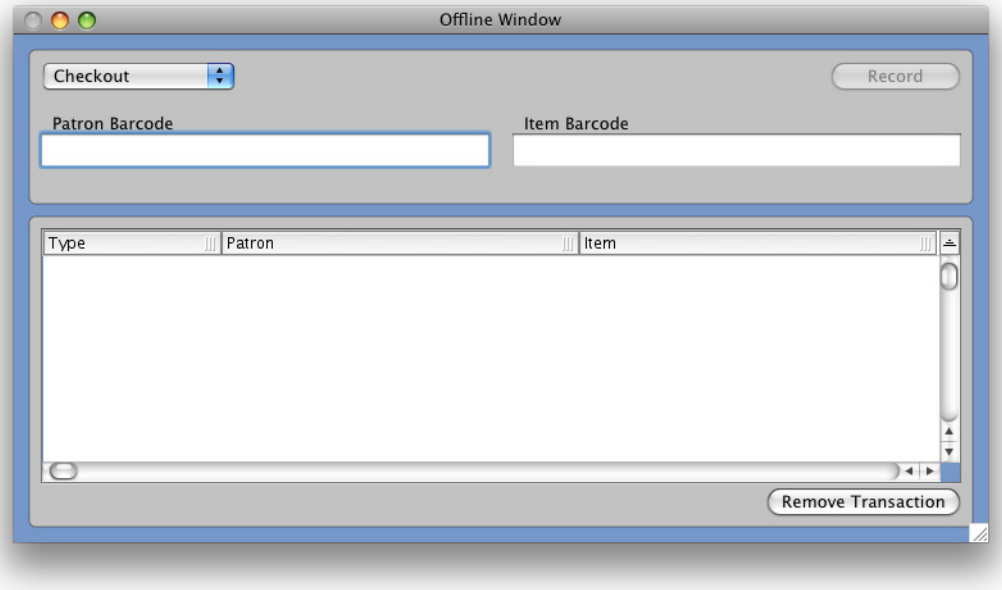


When the Librarian Workstation notices that it has lost communication with the Data Station for any reason, a pop-up window appears, informing the user that its connection has been terminated; this can occur during launch or during regular operation.

This window will allow the operator to either **Quit** so that they may try again later when communications are re-established or **Work Offline**.

If the user chooses to enter **Offline Mode**, the Librarian Workstation will transform itself into an entirely different application. The Librarian Workstation will remain in this mode—a greatly simplified version of the main **Circulation** window—until communications are re-established.

The **Offline Window** allows the operator to perform just a few "safe" procedures: **Check in**, **Checkout**, and **Inventory**. Menu commands are disabled to block any external access outside of the **Offline Window**; the transaction log remains, although little is displayed—without a connection to the Data Station, there is no way for the Librarian Workstation to identify the current item/current patron from the barcode.



However, in order to reduce potential errors during offline operation, the **Offline Window** allows operators to specify what they are scanning/entering by supplying a **Patron/Item** entry line and a command drop-down menu (**Check in/Checkout/Inventory**).

The **Checkout** mode is the only selection that allows the **Patron Barcode** field; the **Check in** (i.e. **Book Drop**) and **Inventory** modes do not require patron record information.

As transactions are entered into the **Offline Window**, they are recorded to a separate **Offline Transactions** log, stored in an **Offline Transactions** file, kept in the local **Alexandria Support** folder. This log is mined for information when moving back to normal online operations.

When the main Data Station is detected again, the **Offline Window** informs the operator and allows them to exit **Offline Mode**. As they exit **Offline Mode**, the Librarian Workstation looks through the **Offline Transactions log** and sends outstanding commands to the Data Station as if the user had imported them using the existing **Import Transaction Script** utility *(these features are discussed in more depth in Alexandria's Online Help)*.

As transactions are processed, they are removed from the **Offline Transactions log**, until there are none remaining. Transactions will be moved to the standard Alexandria **Transaction log** as they are processed while unprocessed transactions remain in the **Offline Transactions log** in case the Librarian Workstation loses communications with the Data Station during the procedure.

Circulation Commands

Circulation Command Basics:

When typing (rather than scanning) barcodes, always follow the barcode with an <enter>.

Make a Patron Current

Command: `P {patron barcode}`

Make a Patron Current—Use this command to make a specific patron the current patron. For example, to make a student with the barcode 100 the current patron, enter "`P100`". This command is useful if you have an overlap in patron and item barcode numbers. Unless you specify otherwise, Alexandria will *always* check the item barcodes before the patron barcodes. Therefore, if you enter the patron barcode in the command line or use the "`X {barcode}`" command, Alexandria will find the item rather than the patron

If a patron barcode is the same as an item barcode, you must always put a "`P`" in the command line before scanning the barcode. However, COMPanion *strongly recommends* that you change either the patron or item barcode to avoid these types of conflicts.

Make an Item or Patron Current

Command: `X {barcode}`

Make a Patron or Item Current—Use this command (followed by barcode) to make an item or patron current. For example, "`X200`" makes a patron with the barcode 200 the current patron and "`X110034`" makes an item with barcode 110034 the current item. If you enter an "`X`" without a barcode, current item and patron are cleared and the main **Circulation** window is restored to **Check In/Out** mode.

Check Out (.)

Alexandria makes it easy to check items in and out by automatically determining whether a barcode you enter belongs to a patron or an item and whether that item is already checked out. Because of this, Alexandria can usually determine the appropriate course of action.

In addition, as you are performing transactions, Alexandria automatically computes the proper due dates, adjusts for closed dates, verifies policies, and collects statistics.

- NOTE -
You can use the equal sign as a substitute for the barcode of the current item in *any* command. For example, if the current item is 3000, then "`H=`" is the same command as `H3000`.

Step by Step: Checking Items Out

Use the following steps to check an item out.

Step 1. Make sure the **Circulation Mode** is set to **Check Out** (`.`).

Step 2. Scan (or type) the barcode of the patron who is about to check an item out. This makes the patron current. If you do not know the patron's barcode, use the lookup command to locate the patron and their barcode *(see page 228)*.

Step 3. Respond to any circulation alert messages that appear.

Step 4. Alexandria calculates the item due date based on your **Policies**. To enter a different due date, use the **Set Override Date** command *(see page 226)*.

Step 5. Scan (or type) the barcode(s) of the copy(s) you want to check out to the current patron. As you check copies out, they become current and appear on the **Circulation** window; a line will be added to the transaction log to show which copies have been checked out.

Special Conditions When Checking Out Items

What the **Check Out** mode does depends on two things: the **Check Out Options** system preference (which allows you to change the behavior of **Check Out** mode; see page 134) and the status of the patron and item. If the item is available, it will be checked out to the current patron when scanned. If the item is already checked out to the current patron, it will be checked in when scanned. If the item is currently checked out to a different patron, a message will appear, allowing the operator to either check it in from the other patron and then out to the current patron or leave it checked out to the other patron.

As you are checking items out, Alexandria will alert you to special conditions that may affect circulation.

For example, if you enter a barcode for a book that is already checked out, a warning message will appear. You can choose to check this book in, or cancel the request to check it out.

If checking an item out to a patron violates a set policy, Alexandria will alert you. For example, if a patron exceeds the number of items they can check out or exceeds the overdue limit, a warning message will appear. If more than one policy setting is violated, multiple messages will appear in a single window.

If you have the authority to override policies, the window will include the **Override** option. You can allow the patron to check the item out (even though it exceeds the specified limit) or cancel their request to check it out. If you don't have the authority to override policies, a warning message will appear, and you are left *without* the option to override or check out the item to the patron.

You can decide to check the copy in instead of overriding the policy problem.

If the barcode you enter is not assigned to an existing item (and is not in the temporary barcode range defined in your system preferences), the **Unknown Barcode** window appears.

You can choose **Ignore Barcode** if you entered it incorrectly, or you can add the item "on the fly".

If a copy is designated as an in-stock hold for another patron, an error message will appear. If you have the authority, **Cancel** / **Override** buttons will appear at the bottom of the window. Clicking **Override** will check the copy out to the current patron and place the student with the in-stock hold back at the top of the hold queue. If you don't have any authority, no override options will be available and item checkout will be denied.

Step by Step: Checking Items In

Use the following steps to check an item in:

Step 1. Scan (or type) the barcode of the item you are checking in. If you are checking-in a great number of items, use the **Bookdrop** mode described on page 227.

Step 2. If the item is already checked out to the current patron, it will be checked in (upon verification) when scanned.

Set Override Due Dates

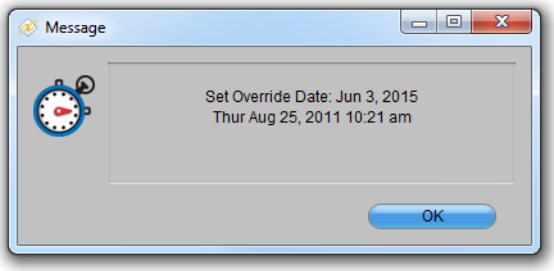
Command: `.{date}`

Set an Override Date—Typically, due dates are computed based on the policies you define in your **System Preferences**. You can use this command to set different due dates for items you are checking out, bookdropping, or performing inventory on. For example, to set the due date to June 3, 2015, type "`.Jun 3 2015`" (including the period) and press `<enter>`.

Until you clear or reset the due date using either "`.`" or "`x`", the following changes will be performed:

- The **Override Date** you set is shown to the right of the command line.

- An entry will be made to the transaction log, documenting that this date was manually set.



- Books you check out will be due on June 3, 2015.
- When you bookdrop, the system will record the book as having been checked in on June 3, 2015.
- When you perform inventory, the inventory date used will be June 3, 2015.
- When you are in **Statistics (Y)** mode, this date is used.

The **Override Date** you set is in effect until you clear it. To clear an **Override Date**, type a period into the command line without a date. The "`.`" command will also clear any special **Circulation Modes** (such as **Bookdrop** or **Inventory**) that were in effect. The period command "`.`" without a date is a quick way to reset the **Circulation** window to **Check Out** mode.

Checking out items using an **Override Date** forces them to be due on the day provided, regardless if that date is **Closed** in your **Calendar Preference** *(see "Calendar Preferences" on page 103)*.

Step by Step: Set an Override Date

To set an override date:

Step 1. First enter the desired **Circulation Mode**.

Step 2. Then type "`.MMDDYY`" (or "`.MM/DD/YYYY`" or "`.M/D/YY`", etc.) and press `<enter>`.

To clear an override date:

Step 3. Type "`.`" and press `<enter>`

Bookdrop Mode (B)

Command: `B {optional barcode}`

Using Bookdrop Mode—Use this command to bookdrop items for one or for many patrons. In **Bookdrop** mode, all item barcodes you scan (or enter) are checked in. This allows you to return a large number of books at the end of the day, week, month, or year without worrying about patron barcodes.

While in **Bookdrop** mode, Alexandria assumes you are only checking items in. If you type or scan a barcode for an item that is *not* checked out, an error message will appear in the transaction log. If you enter a patron barcode, Alexandria switches to **Check Out** mode and makes this patron the current patron.

Step by Step: Bookdrop an Item

To check in a single item:

Step 1. To check in one item, type "`B`" in the command line followed by the copy barcode number and press `<enter>`.

To check in multiple items:

Step 1. Enter **Bookdrop** mode by typing "`B`" and pressing `<enter>`, or choosing **Start Bookdrop** (Cmnd/Ctrl+1) from the **Actions** menu. You can also select **Bookdrop (B)** from the drop-down menu to the left of the command line.

Step 2. If different than today's date, set an override date *(page 226)* for the date the copies were returned.

Step 3. Scan (or type) the barcode(s) of the copies to check in.

Step 4. Respond to any circulation alert messages that appear.

When finished using the bookdrop or override date modes, clear them by typing "`.`" and pressing `<enter>`.

Additional Circulation Commands

Use these commands to locate patrons and items for which you don't know the barcode number. For example, if you want to check a book out to a patron, but you don't have that patron's barcode number, you can use the lookup command to find that patron by name.

When you enter a locate command, a **Lookup** window appears starting with the patron or item that is the closest match to the last name you specified or the title you entered. When you select a patron or item from the results list, they become the current patron or item and appear in the **Circulation** window.

Locate a Patron by Last Name (L)

Command: `L {patron last name}`

Locate a Patron by Last Name—Use this command to locate a patron by last name and make them the current patron. For example, to find a patron with the last name Smith, enter "`L SMITH`". You only need to provide enough of the last name to get to the general area on the **Patron Lookup** window (e.g. `Smi` for Smith). Use the up and down **More** arrow buttons to reveal patron records *previous to* or *after* your selected search result entry.

Step by Step: Locate A Patron

To look up a student by name:

- Either select **Lookup** from the **Actions** menu (in the Current Patron section) or type "`L`" in the command line.
- Type the student's last name and press `<enter>` or **Go**.
- Highlight (select) the correct name and then press `<enter>`, click the **Select** button, or double-click on the correct name from the results list.

Locate an Item by Title (T)

Command: `T {title}`

Find Item by Title—Use this command to search for a copy by title (or a portion of the title). For example, to locate a title beginning with *Foundation*, type "`T foundation`" and press `<enter>`. The **Item Lookup** window appears, starting with the title in your collection that most closely matches the information you supplied.

Step by Step: Locate An Item

To look up an item by title:

Step 1. Either select **Lookup** from the **Actions** menu (in the Current Item section) or type "`T`" in the command line.

Step 2. Type the first part of the title and press `<enter>` or **Go**.

Step 3. Highlight (select) the correct title and then press `<enter>`, click the **Select** button, or double-click on the correct title from the results list.

Placing a Hold Request on a Title (H)

Command: `H {item barcode}`

Placing a Hold Request—Use the "H" command to place a hold on an item for the current patron or to activate **Hold** mode.

To hold an item for the current patron, type "H" and then type (or scan) the item's barcode number and press <enter>.

If you do not know the item's barcode number, locate it using the **Item Lookup** "T" command.

To start **Hold** mode, type "H" and press <enter>; a current patron is required. A hold request is placed on each item whose barcode number you type (or scan) while in **Hold** mode. To exit **Hold** mode, type (or scan) a new patron barcode number or use the "X" or "." command.

- Holds are against a single item record. If one copy of that title is available, the hold becomes an in-stock hold waiting for the patron to pick up the item.
- If a hold is placed on a title that has available copies, the hold will be converted to an in-stock hold on a specific copy.
- In-stock holds are removed when the copy is checked out. Checking out a different copy of the same title does not remove the in-stock hold.

- NOTE -
An equal sign "=" is used as a shortcut for the current item barcode. For example, if you have a current patron (and item), "H=" will place a hold on the current item.

Step by Step: Place A Hold

To place a hold:

Step 1. First, scan (or type) the patron's barcode to make them current.

Step 2. Next, use the **Lookup** command "T" and enter the name of the title.

Step 3. Select the correct title from the **Item Lookup** window by double-clicking on the name or by highlighting the correct title and pressing <enter> or clicking the **Select** button.

Step 4. Finally, type "H=" <enter> in the command line, followed by <enter>, to place a hold on the current item for the current patron.

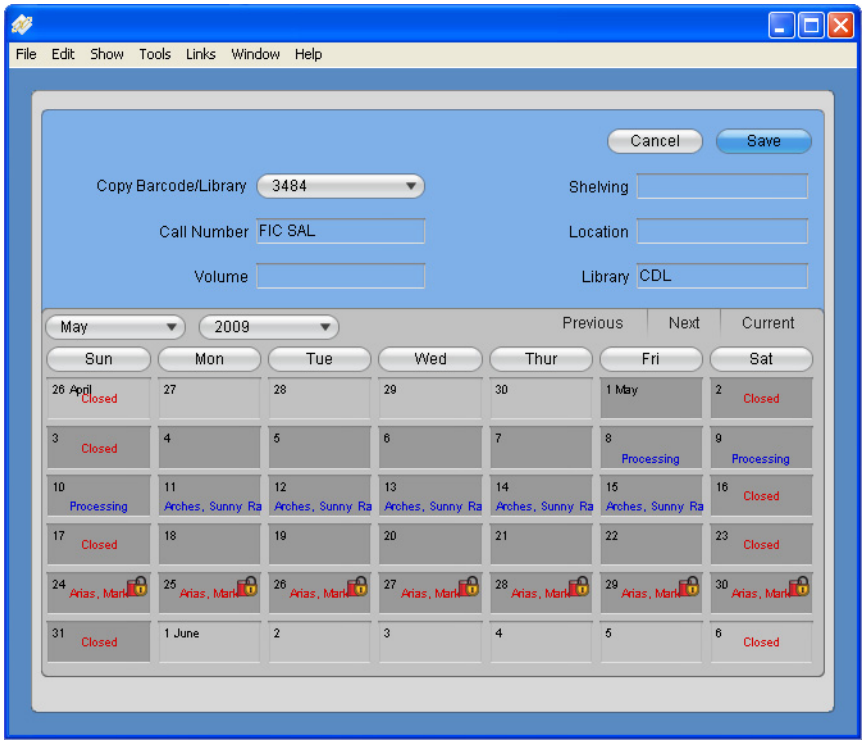
Place a Forward Reservation on a Specific Copy (G)

Command: `G {item barcode}`

Place a Reservation—The current patron places a reservation on an copy or activates the **Reservation** mode.

- To place a reservation on an copy (if you have a current patron), type "G" and then type (or scan) the barcode of the copy; press <enter>. If you do not know the copy's barcode number, locate it using the **Item Lookup** "T" command *(see page 228 to review)*.

- To activate **Reservation** mode, type "G" and press <enter>. A reservation for the current patron is placed on every copy whose barcode you type (or scan) while in this mode. To exit **Reservation** mode, enter a new patron barcode number or use the "X" or "." command.
- When you enter the "G" command, Alexandria opens a calendar window to mark the days for which you would like reservations placed on (for the current patron). The calendar will show the current month.



You *cannot* make reservations on days marked with the lock icon.

Here's how the reservation calendar will mark days:

- Days that the library is closed show the word **Closed** in red. The example on the previous page shows the library is closed on Saturdays and Sundays.
- Days that have existing reservations are marked with a locked book icon. The barcode number or name of the patron who has the copy reserved for that day that will be shown in red. Copies that are checked out or have in-stock holds placed on them are also shown in red. New reservations will be shown as blue.
- You may select different months or days or select another copy of the title (if available) from the drop-down menu in the upper left-hand side of the calendar.
- If the copy you are trying to place a reservation on is currently overdue, it will be shown as red in the middle of the calendar day and prefaced with an asterisk. Only the days after a copy is due back will be marked as overdue.

NOTE:
Make sure the reservation dates are correct before you save. They cannot be changed later. To change dates, you must delete the incorrect reservation and place a correct one.

To make a reservation for the current patron, click on the day (or click and drag across multiple days) for which you'd like to reserve the copy. Days you select will be marked with the patron's barcode number or name in blue. To omit a day you have mistakenly selected, click on it again.

You can select any available days as long as you don't exceed the number of days allowed in your policies for patron and item. If preferences allow, you can select closed days to start and end reservations on.

When you have selected your reservation days, click **Save**. You can make more than one reservation on the calendar for single or multiple copies.

Use the **Cancel** button if you want to exit the calendar window without placing a reservation.

To print reports for copies with reservations, select the **Circulation** category from the **Reports** window followed by the **Reservations** subcategory. Using the **Selection** tab options for the **Reservations** report, you can specify which reservations to print.

- NOTE -
Reservations are against specific copies for specific days. Only the patron who placed the reservation can check out that copy during the time of the reservation.

Step by Step: Create Forward Reservation

To create a forward reservation:

Step 1. First scan (or type) the patron's barcode to make them current.

Step 2. Next, type "G" and then scan (or type) the barcode of the copy on which to place the reservation.

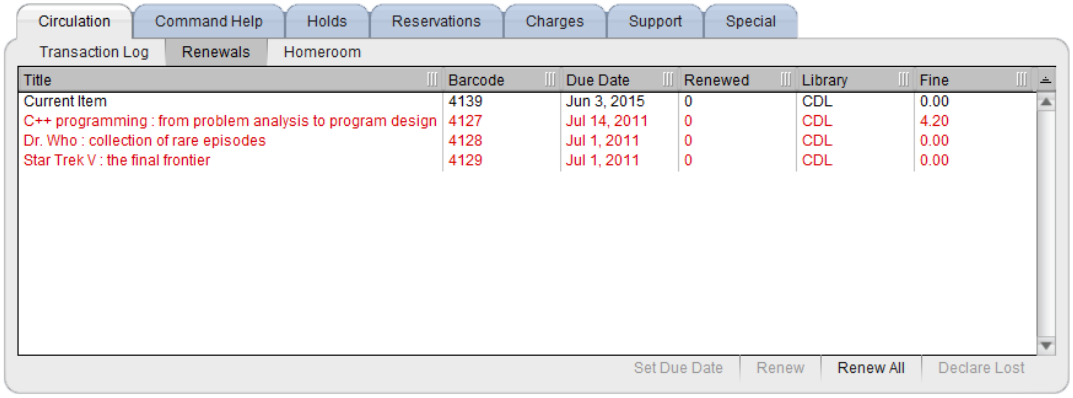
Step 3. Select (highlight) the dates for the patron's reservation of that copy.

Step 4. Click **Save** when finished.

Renewing An Item (QE, R, or RA)

Command: `QE`

Opens the Renewals tab—To view renewal options for the current patron, type "`QE`" in the command line and press `<enter>`, or choose **Renew Patron Items** (Cmnd/Ctrl+R) from the **Actions** menu. These commands will open the **Renewals** subtab of the **Circulation** window's main **Circulation** tab, containing a list of all the books checked out to the current patron, allowing you to choose which books to renew or declare lost (both are also menu options).



The **Renew All** button will fail to renew items that have holds placed on them if your policy preferences indicate that renewing items with holds is disallowed. If you want to override this and renew them all anyway, highlight (select) all of the items by clicking on the first item in the list while holding down `<shift>` and then proceed to click on the last item in the list. Then, click the **Renew** button. The renew option will generate any override dialogues as appropriate and allow authorized operators to override them as desired.

Renew All—Renews all of the current patron's items.

Declare Lost—The selected (highlighted) items will be assigned to the **Lost Copies System Patron** and then registered as lost.

Renew—Renews one item at a time; also renews a range of selected (highlighted) items.

Renewing an Item

Command: `R {item barcode}`

Renewing an Item—Use this command to renew an item or activate **Renew** mode. You can specify the number of times an item can be renewed in your **Policies** *(see "Policy Preferences" on page 105)*.

To renew an item:

- If the copy is present, type "R" and scan (or type) the item barcode number and press <enter>. If your **Policies** allow, this copy is renewed to the patron who has it checked out. That patron also becomes the current patron.
- If you do not know the item barcode (or the item is not present), enter the patron's barcode number and press <enter>. Then, type "QE" and press <enter>. Select (highlight) the item to renew from the list and click on the **Renew** button from the **Renewals** subtab of the main **Circulation** window's **Circulation** tab.
- To start **Renew** mode, type "R" and press <enter>. All item barcodes you scan (or type) while in this mode are renewed. To exit **Renew** mode, enter a patron barcode number or use the "X" or "." command.

If renewal is not allowed, you will be informed by Alexandria. A renewal is not allowed when your **Policies** are set to refuse renewals or when renewing an item would take it into a reserved date range.

Renew All Items

Command: `RA`

Renewing an Item—When you have a current patron, this command renews *all* the items checked out to that patron. The **Renew All** command is different from the **Renew** command in that it overrides *every* policy restriction *except* for a renewal with holds on the item.

Step by Step: Renew All

To renew items:

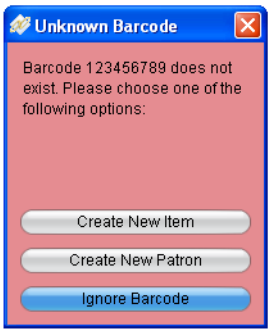
- If you do not know the item barcodes (or the items are not present), enter the patron's barcode number and press <enter>. Then, type "QE" and press <enter>. Select (highlight) only the items you wish to renew from the list and click on the **Renew** button from the **Renewals** subtab of the main **Circulation** window's **Circulation** tab.
- Or, if the items are not present and the patron wishes to renew *all* their copies, type "RA" into the command line of the main **Circulation** window followed by the patron's barcode number and press <enter>. This will automatically renew all items checked out to that patron.
- Alternately, you may click the **Renew All** button from the **Renewals** subtab of the main **Circulation** window's **Circulation** tab to renew *all* copies.

Adding Items "On the Fly"

To add an item "on the fly":

Step 1. Optional step: type (or scan) the patron's barcode number.

Step 2. Place a barcode label on the item and type (or scan) the number. The following window will appear:


Unknown Barcode
Barcode 123456789 does not exist. Please choose one of the following options:
Create New Item
Create New Patron
Ignore Barcode

Step 3. Click on **Create New Item**. Depending on your preferences *(see "System Preferences: Management tab" on page 120)* and/or permissions, either a blank **Items** management window or the **Add Title Assistant** window will appear.

Step 4. Provide all the information you desire. **Barcode**, **Title** and **Policy** are the only fields that are required (in both the **Add Title Assistant** and the **Items** management window).

Step 5. Click the **Save** button in the upper-right corner of the **Items** management window.

Special Circulation Commands

Charging a Fee (F)

Command: `F`

Fee Charges and Payments—To view charges and payments or refunds and credits for the current patron, type "`F`" in the command line and press `<enter>`, or choose **Make Charges/Payments** (Cmnd/Ctrl+2) from the **Actions** menu. These commands will open the **Charges** tab of the main **Circulation** window.

> **- NOTE -**
>
> To charge a patron for a damaged book after it has been checked in, use the "`F {fee amount} {comment/description}`" command in **Circulation** window with a current patron. For example, if patron `1621` bookdropped a damaged item, the librarian can later enter patron `1621` into the **Circulation** window and fine them a $20.00 fee by typing "`F 20.00 Charles scribbled in index`" into the command line.

Command: `F {fee amount} {comment/description}`

Charging a Fee—Use the "`F`" command followed by a dollar amount and optional comment to issue a charge against the current patron. For example, to charge a $4.50 fee for the library Reading Club membership, type "`F 4.50 Reading Club`" and press `<enter>`.

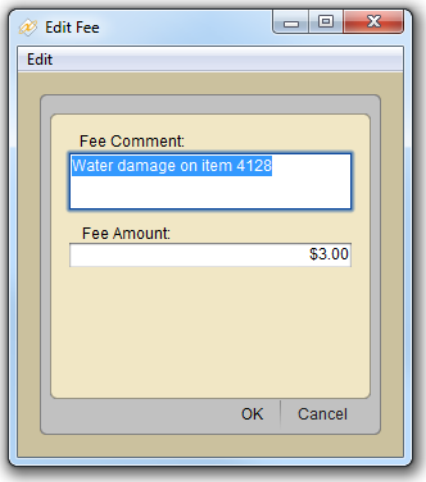
Step by Step: Charging A Fee

To charge a fee:

Step 1. Make the patron current by typing or scanning the patron's barcode (or by using the **Patron Lookup** "`L`" command to locate the patron by last name).

Step 2. Next type the **Fee (F)** command, followed by the fee amount and an optional description of the fee. Then, press `<enter>` (e.g. `F $3.00 Water damage on item 3027`).

Step 3. Once you charge a fee, you can edit it if you made a mistake. In the **Charges** mode (and tab) of the **Circulation** window, select (highlight) the charge from the list and click on the **Edit Charge** button. You can modify either the **Fee Comment** or the **Fee Amount** (except on overdue fees which are still accruing).



Declaring a Copy Lost

Use the **Lost Copies** special patron to flag copies for later removal. Use this feature at the end of the year when you must account for how many assets were lost and their accumulated worth.

When an item that is checked out to a patron is declared **Lost** (i.e. checked out to the **Lost Copies** patron), the **Lost Book Charge** window appears, allowing you to fine the patron who has lost the item.

Step by Step: Declare An Item Lost

To declare an item lost:

Step 1. While in **Check In/Out (.)** mode, type **1** in the command line and press <enter>.

Step 2. The **Lost Copies** patron will appear as the current patron.

Step 3. Type the barcode of the copy that was lost. Remember to press <enter> after each barcode.

Step 4. If a lost copy is still checked out to the offending patron, you don't need to bookdrop the item first—just check it out to the **Lost Copies** system patron.

When an item that is checked out to a patron is declared **Lost**, the **Lost Book Charge** window will appear.

Step by Step: Charge A Lost Item Fee

Use the following steps to charge a **Lost Item** fee:

Step 1. The **Total Patron Fines Due** is pulled from the item copy **Replacement Cost** (from the **Items Management** window) field or your **Default Replacement/Purchase Value** policy field. You may enter any additional charges or processing fees in the **Additional Charge** field.

Step 2. If applicable, enter a portion of the accrued fine or lost book charge to be forgiven in the **Forgiven Amount** field.

Step 3. If the current patron has a credit balance on their account, you may choose to make a payment against the fee **From Credit**. If credit is available, the **From Credit** field becomes modifiable and their current credit balance is shown between the parentheses.

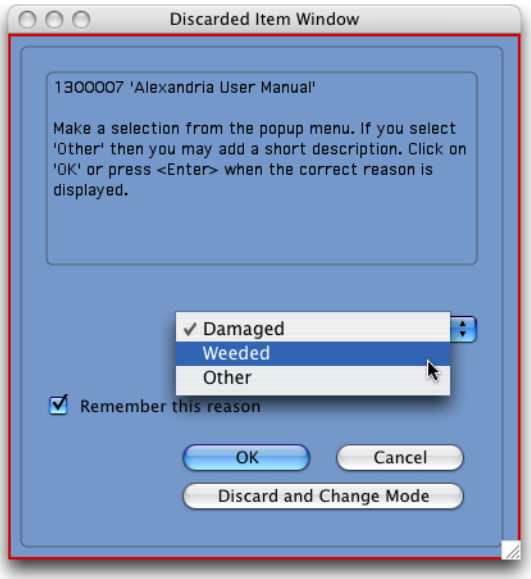
Step 4. If you supply a **Payment** amount, the **Payment Method** drop-down menu becomes selectable; you may then choose from **Cash**, **Check**, **Charge**, or **Other**.

When you are satisfied with the fee you have charged, click the **Charge Fine** or **Charge Fine and Print Receipt** buttons to charge the fee and print an optional receipt. These receipts can either be given to the patron at time of charge or filed by the library for safekeeping. If you would like to forgive the current charge (plus any additional amounts)—minus the amount of payment—click **Forgive Fine**.

Checking Items Out To the Discarded Copies Special Patron

Use the **Discarded Copies** special patron to flag copies for later removal. Use this feature at the end of the year when you must account for how many copies were discarded and their accumulated worth.

When checking an item out to the **Discarded Copies** patron (barcode 2) you are allowed to indicate the reason for the item's disposal.


Discarded Item Window
1300007 'Alexandria User Manual'
Make a selection from the popup menu. If you select 'Other' then you may add a short description. Click on 'OK' or press <Enter> when the correct reason is displayed.
Damaged
Weeded
Other
Remember this reason
OK
Cancel
Discard and Change Mode

You may choose three different options from the drop-down menu of the **Discarded Item Window**. Click **OK** or press `<enter>` when the correct reason for item's disposal is selected.

- **Damaged—**If the damaged item *is not* checked out to a patron, you may check it out to the **Discarded Items** patron (Special Patron #2) with the **Reason** as **Damaged**. Nothing will happen to the item other than it is marked as "`Discarded-Damaged`". This is similar to declaring an item—that was not checked out to a patron—as lost.

  However, if the damaged item *is* checked out to a patron and is then checked out to the **Discarded Copies** patron without being checked in first, then the **Discarded Items Window** will change and display the item's **Replacement Cost**, allowing you to charge a fine to the patron who last borrowed the book (and presumably damaged it). Clicking on **Charge Fine and Print Receipt** or **Charge Fine** will charge a fine to the offending patron and place a note in the transaction log. However, you may also choose **Forgive Fine** if you do not wish to charge the offending patron for the replacement cost.

- **Weeded—**If you are removing a certain book (or series of books), this option will check books out to the **Discarded Copies** special patron and apply the disposal reason as "weeded".

- **Other—**Selecting this option allows you to add a short piece of descriptive text that specifies the reason for the item's removal. These reasons for removal will be displayed when you perform the **Discarded Copies** report. Entering a definitive reason such as "outdated," "worn out", or "no longer used", allows you to print a **Reordering Details** report which will assist you in reordering items that have been discarded and need to be replaced.

Step by Step: Discarded Copies

To declare an item discarded:

Step 1. While in **Check In/Out (.)** mode, type **2** in the command line and press <enter>.

Step 2. The **Discarded Copies** patron will become the current patron.

Step 3. Scan (or type) the barcode of the copy to be discarded. Remember to press <enter> after each barcode if you are typing the barcode.

Step by Step: Utilities

Use the **Copies Utilities** to permanently remove all **Lost** or **Discarded** items after you have run the necessary reports.

Step 1. Select **Utilities** from the main **Tools** menu.

Step 2. Click on the **Copies** category.

Step 3. Select either the **Remove Lost Copies** or **Remove Discarded Copies** utility.

Step 4. If you wish, limit which copies to remove using the **Select By** drop-down menu options under the **Selection** tab.

Step 5. Click the **Run** button to perform the utility.

- NOTE -
As with *every* utility, perform an **Archive** of your **Data** file prior to running the utility to remove all discarded or lost items.

Item Management

This section provides a brief overview on how to manage the assets in your library.

- CENTRAL UNION -

If you are using a Central Union license for Alexandria, all libraries share title information, thus, all other libraries can view the changes you make.

Although the Alexandria Librarian Workstation allows you to view and edit titles from every collection in your district, only *your* title statistics and copy information may be modified from your Workstation.

The District Librarian Workstation allows viewing and editing of all database information across all collections.

About MARC records

All Alexandria item data is saved in MARC[1] (**MA**chine-**R**eadable **C**ataloging) record format, the standard for bibliographic data around the world. If you don't know MARC standards, Alexandria has a simple editor that lets you view and edit MARC data without *any* technical MARC knowledge.

For those who are familiar with MARC standards, our powerful **MARC View** editor is available for correcting your data. You can switch between the two editors using an **Actions** menu selection or the (Cmnd/Ctrl+M) keystroke.

Although it's hidden from view, Alexandria saves additional information in the MARC record for library automation duties. This information is Alexandria-specific and is not shown in the MARC editor. However, if you export data to transfer into another Alexandria Data Station or COMPanion application, the export functions *will* include this Alexandria-specific information.

The MARC standard is complex and ever-changing. Thus, there may be information in your MARC records that is valid MARC data, but unused by Alexandria. It may be that newer versions of Alexandria will use this data, so it's carefully stored with the rest of the MARC data. If you have MARC information that you'd like Alexandria to process, send a written request to:

```
Alexandria MARC Suggestions
COMPanion Corporation
1831 Fort Union Boulevard
Salt Lake City, Utah 84121
```

Or, send an email to: "ideas@companioncorp.com"
Your request will be reviewed and you'll receive a response.

1.To learn more about MARC tags and subfields, visit the Library of Congress' website: http://www.loc.gov/marc/

Items Management Window

To open the **Items** management window, select **Items** (Cmnd/Ctrl+I) from the main **Show** menu.

Alexandria creates, stores, and updates MARC records with the information you provide in the **Items** management window, which allows you to manage the information about the items in your database. Everything that circulates (books, magazines, audio video media, etc.) is accessible through the **Items** management window.

The term "item" can also mean "asset", "title", "issue", or "copy" depending on the context. An item can be a book, video, filmstrip, newspaper, or any other form of media in your collection and each "title" can have multiple "copies".

- **Title Information** consists of data that is identical for all copies of a particular item, including author, publication, and notes.
- **Copy Information** consists of data that is specific to any given copy.

Switching from the **Items** management window to the **Circulation** window will make that item current in the **Circulation** management window. Likewise, if you have an item current on the **Circulation** window and activate the **Items** window, that item's record information will be displayed.

If there is no copy record in the current item section of the **Circulation** window when the **Items** management window is opened, the default selection will be the last fifty modified titles. If your database contains *no* item records, COMPanion will always offer a sample record—the *Alexandria User's Manual*.

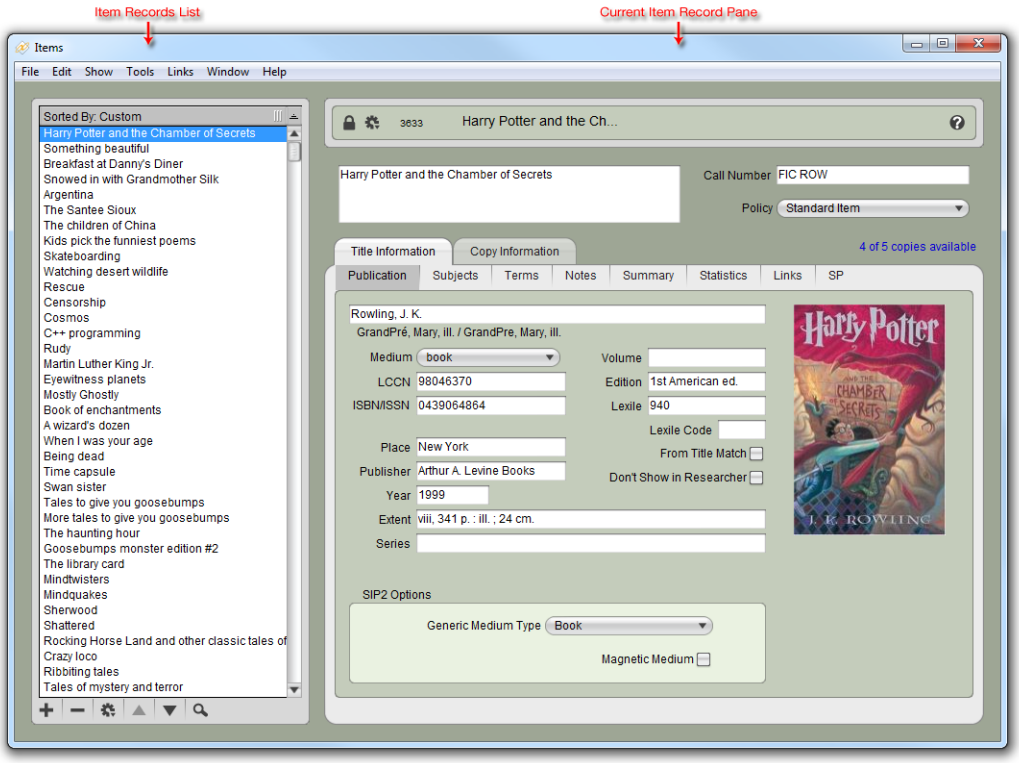
If the **Items** management window is opened while the <Alt>/<Option>-key is depressed, the default selection will be the last fifty titles added to Alexandria, ordered by **Sequence Number**; also, a **Sort By Title Sequence #** selection will be available in the **Item Selection Window** (Cmnd/Ctrl+F) in both **Simple** and **Advanced Title**/**Copy**).

The Items Management Window In More Detail

The **Items** management window consists of two distinct areas:

The left-hand side of the **Items** management window belongs to the **Item Records List** and related tools.

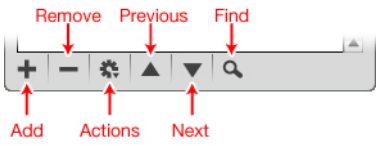
The larger, right-hand portion of the **Items** management window consists of the 'current item record pane' where the selected item record is displayed, in full, along with associated tools that help perform operations on said record.



Item Records List and Associated Tools

The left-hand section of the **Items** management window contains the **Item Records List** pane, where all titles matching an operator's **Find** (Cmnd/Ctrl+F) will be displayed in the user-specified **Sort By** selection from the **Item Selection** window. Highlighting/selecting an entry in the **Item Records List** will make that record current in the right-hand section of the **Items** management window.

The area situated below the record list field contains several **Tools** icons that are used for adding, removing, browsing, and finding item records *(for more information, please review the "Items Management Window in More Detail" section of Alexandria's Online Help)*.



Current Item Record Pane

The right-hand section of the **Items** management window displays full record details for the item that's selected from the list on the left.

The top of the current item record pane is for displaying status information: **Save** and **Revert**, the **Online Help** icon, the **Lock/Unlock** icon and a secondary **Actions** menu which contains functions specific/unique to the current record.

Unlock/Lock Icon—When the **Items** management window is opened, the default state of the lock icon is usually "locked". When locked, records can be viewed but not edited. Clicking on the lock icon unlocks the window; it stays unlocked until the operator clicks on the lock icon again or the window is closed.

Actions—This gear/cog menu contains record-specific actions and other tools that don't fit as well with the **Add**, **Remove**, and **Find** functions offered in the primary **Records List Actions** menu *(for more information, please review the "Items Management Window in More Detail" section of Alexandria's Online Help)*.

Online Help—This button opens your default web browser to the **Items** management section of Alexandria's **Online Help**.

The top of the **Current Item Record** pane contains the **Call Number**, **Policy**, and **Title** for each item record. This portion of the **Items** management window is always visible regardless if you have the **Title Information** or **Copy Information** tab selected.

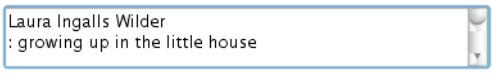
The fields that top the **Items** window are as follows:

- **Title—**A title is required; the record will not be saved unless a value has been entered in the **Title** field. The title is saved under MARC field **245_a**.

  In the **Title** field, if you enter a title that is longer than the line, the text wraps to the next line. To enter a subtitle, press <return> on the keyboard and enter a colon (":") followed by the subtitle. When you save the record, it is displayed with the colon and subtitle on the second line. This is saved under MARC field **245_a**.

  You can also use the equals sign ("=") in the **245_b** tag to designate a subtitle. However, the ("=") is mainly for multilingual titles.

For example:



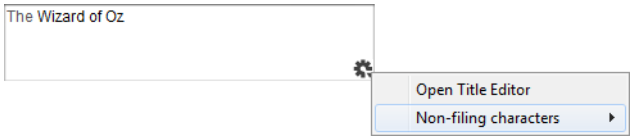
If you want to continue manually entering or editing MARC information from the **Title** field, you can enter statements of responsibility and general material designation. Begin a statement of responsibility (**245_c**) with a front slash ("/") and enclose the medium in brackets ("[]"). All subfield information must begin on a new line in the **Title** field.

If you enter a medium, it will be saved to the **Medium** drop-down menu; it will not be shown in the title field.

If you enter a statement of responsibility, and the **Show Statement of Responsibility in the Title Field of the Items Window** system preference is set to *not* show this (i.e. unchecked), it *will* be saved in the **Title** field of the **Items** management window, but not displayed.

Or, if you enter title information and then <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of the **Title** field (or if you have **Authority Control** enabled), an **Authority Control Title Search** window will appear, allowing you to see if this title is already properly tagged in your collection. If the title is recognized, the **Authority Control** window will not display.

Stored within the **Actions** menu of the **Title** field is the **Non-Filing Characters** (**Indicator 2**) drop-down menu with the digits 0-9. Use this drop-down menu to specify the number of characters in the title to ignore when indexing the title. Thus, the title *The Wizard of Oz* should have a "4" selected so the book is sorted (indexed) as "Wizard of Oz". The final character to ignore must be either a blank space or punctuation character. If this indicator is set incorrectly, Alexandria will revert the **Non-Filing Characters** setting to zero rather than ignore a partial word.



- **Call Number—**Each title is assigned a call number. The call number designates the location of an item in the library. Because call numbers are site-specific rather than universal (such as LCCN or ISBN), you must enter call numbers that are specific to your library. The call number is saved in MARC field **900_a**.

  Depending on their source, imported MARC records may or may not include call numbers for your items. Alexandria formats call numbers to remove control characters and double spaces, thus repairing incorrectly formatted numbers.

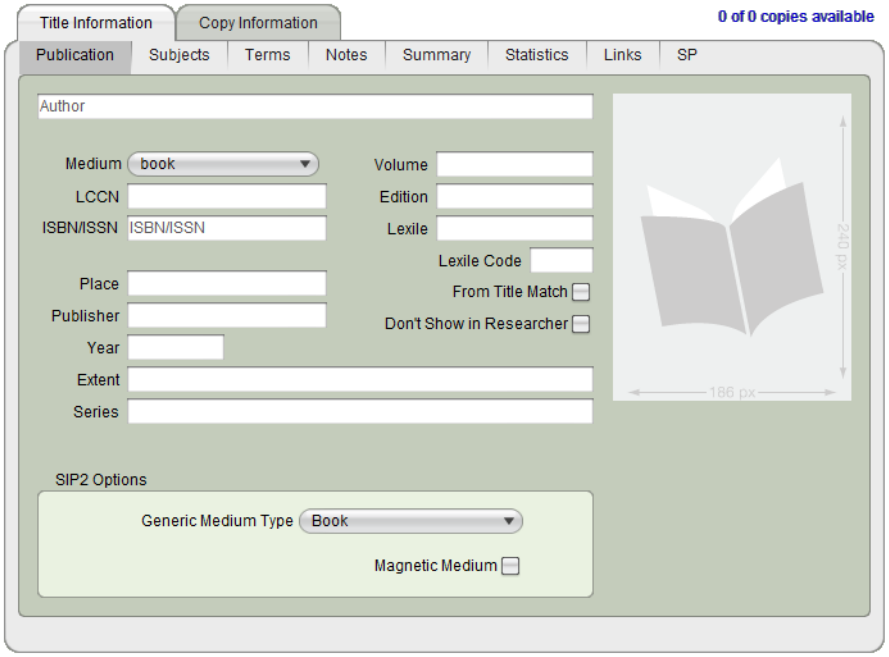
  Copies "inherit" the title call number unless a specific copy call number is exclusively changed.

- **Policy—**Every title is given a policy which determines the circulation rules that govern a particular group of items. In addition to enforcing circulation rules, a policy is used to group items for statistical analyses and reporting purposes.

  Copies "inherit" the title policy unless a specific policy is exclusively assigned.

Current Record Tabs and Subtabs

The largest section of the current record pane consists of the **Title Information** and **Copy Information** tabs and relevant subtabs; these tabs contain the editable fields, drop-down menus, and checkboxes that are essential to managing information related to the assets in your collection.



For more detailed information, please review the "Title Information" and "Copy Information" sections of Alexandria's Online Help.

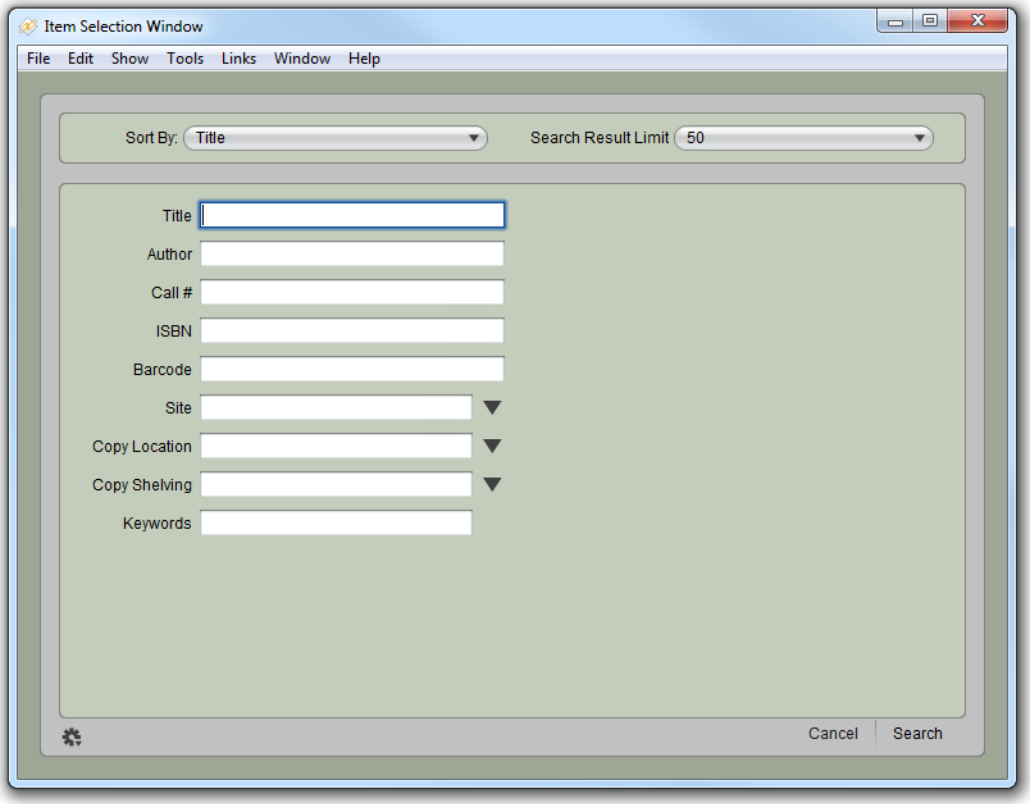
- **Title Information—**The **Title Information** tab and related subtabs contain standard information for each title record. Within these tabs and subtabs, you may view or edit information about each title.
- **Copy Information—**The **Copy Information** tab and related subtabs contain information and allow you to view or edit the contents of each copy belonging to the title.

  You cannot view or edit information in the **Copy Information** tabs until the primary **Title Information** has been saved.

Finding Items

The **Find** (Cmnd/Ctrl+F) command under the primary **Actions** menu—or magnifying glass icon—opens the **Item Selection** window, used to locate a specific item in your database. For example, if you are looking for a title starting with the word "`Wizard`," every item that closely (or exactly) matches that title will be selected (in alphabetical order) for the **Item Records List** of the **Items** management window; the item placed at the top of the list is chosen as the **Current Item**.

Change the selection in the **Sort By** drop-down menu to choose to search other fields. Click the arrows at the end of fields to choose to search for an item that starts with (or exactly matches) the information you enter. If no record can be located, an audible alert will sound and the current record will not be changed



The **Sort By** drop-down menu allows you to select *where* to search for the data (i.e. **Title**, **Author**, **ISBN**, **Barcode**, **Site**, etc).

The **Search Result Limit** drop-down menu allows you to limit the number of returned results on your **Find**; you can choose between **50** (default), **200**, **500**, 1000, **2000**, or choose not to limit your results and have **All Records** returned.

Click the **Search** button to locate the record or click the **Cancel** button to close the **Item Selection** window and return to the most recent item record. If a **Search** is performed, the **Item Records List** in the **Items** management window is populated with results and automatically set to the same selection as the **Sort By** drop-down menu of the **Item Selection** window.

Adding Titles and Copies

Use the **New Record** (Cmnd/Ctrl+N) command, ("**+**") button, or corresponding selection from the from the primary **Actions** menu to add records to your Alexandria database.

When you select this command, a blank **Items** management window will appear (depending on if you have the **Add Title Assistant** active)—prompting you for title information.

Provide essential information by typing over the grayed-out (watermarked) data entry fields in the window (such as **Title**, **Author**, and so forth) to add a new record.

To move to the next blank data entry field, drop-down menu, or button, press the `<tab>` key. To move to the previous blank data entry field, drop-down menu or button, press `<shift-tab>`. To edit information in a particular data entry field, click in the associated field. To change a selection in a drop-down menu using only your keyboard, use the `<up>` and `<down>` arrow keys when the drop-down menu is outlined with a blue focus ring. When a button is outlined and you wish to perform that action, press the `<spacebar>`.

When you enter any type of specially-formatted information such as dates, phone numbers, or social security numbers, you can enter values in a wide range of formats. For example, you can enter the date of December 1, 2013 as: "`Dec 1, 2013`" or "`12/1/13`" or "`12.1.13`" or "`12 1 13`". If using the current year, you can just enter "`12/1`". If the current month is December, you can just enter "`1`"[1].

When you have provided all the information this record requires, click the **Save** button in the upper right-hand side of the window. The record has now been saved. If you want to discard the information you have just entered, click the **Revert** button and the previously saved record information will be restored.

If you don't have **Automatically Save when Closing/Deactivating a Window** selected in your **Site Information** system preferences *(see page 80)* and you try to leave the window without saving your changes, a warning message will appear, asking if you'd like to **Discard** or **Cancel**. If you click on **Cancel**, you'll return to the previous window with your newly-entered information still intact. Click the **Discard** button if you want to abandon the data you just entered. Otherwise, click the **Save** button to save your input.

The very minimum of required information for new titles are: **Title**, **Non-Filing Characters** (**Indicator 2**), **Medium** and **Policy**. Of these fields, all but **Title** are defaulted—so it's not like you could ever really not have this information. Titles may be added with or without copies.

The only required field for new copies (i.e. a copy added to a title) is **Barcode**.

All defaults will be supplied by Alexandria; these defaults may be changed.

In order to add new copies to the current title, use the **Add Copy** (Cmnd/Ctrl+Y) command to open a blank **Copy Information** tab. Remember, copies are part of the title record and cannot be added until the main title record has been saved.

When you have added all the necessary information for this copy, click the **Save** button in the upper-right corner of the window. Add any additional copies you desire and then click the **Save** button. If you want to discard the information you have entered, click the **Revert** button.

See Alexandria's Online Help for more information on the **Copy Information** tabs and subtabs.

1.When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

Step by Step: Create Title Record

To add a title record:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the **Show** drop-down menu.

Step 2. Press the **Add Record** ("**+**") button or choose **New Record** (Cmnd/Ctrl+N) from the primary **Actions** menu (located below the **Item Records List**).

Step 3. Make sure to provide the appropriate **Title**, **Call Number**, and **Policy**.

Step 4. In the **Title Information** tab, provide the necessary information in the **Publication**, **Subjects**, **Terms**, **Notes**, **Summary**, **Statistics**, **Links**, and **SP** tabs.

Step 5. When all the appropriate fields have been filled in, click the **Save** button.

Step by Step: Add Copies

To add a copy:

Step 1. Locate the main title record *(page 228)* for which you would like to add a new copy.

Step 2. Select **Add Copy** (Cmnd/Ctrl+Y) from the secondary **Actions** menu (located above the **Current Item Record Pane**).

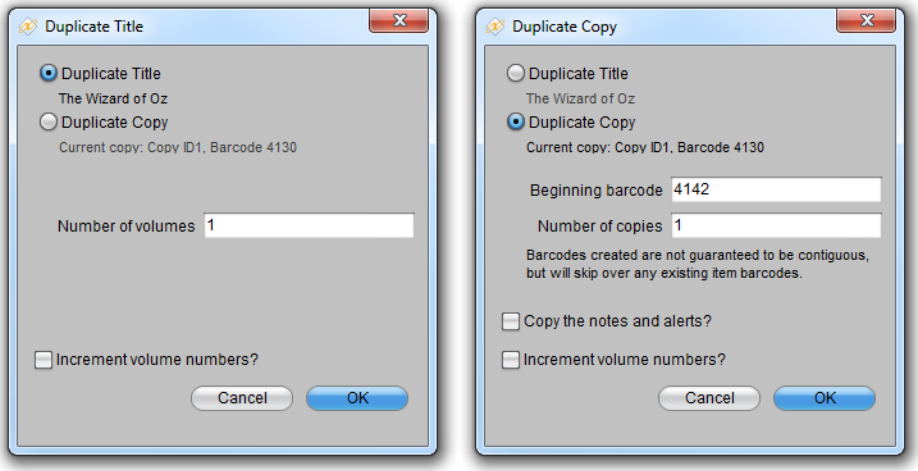
Step 3. Provide the necessary information in the **Copy Info** or **Copy Notes** tabs.

Step 4. When all the appropriate information has been supplied, click **Save** in the upper-right corner of the main **Items** management window to save the copy.

Duplicating Titles or Copies

Use the **Duplicate** (Cmnd/Ctrl+D) command or selection from the primary **Actions** menu to make duplicates of existing titles. You can then modify information for the newly created title. This saves valuable data entry time when you are adding new items that have similar information (such as author, publisher and series).

After choosing to **Duplicate** the selected title, the **Duplicate Title/Copy** window appears.



Select whether you want to add a **Duplicate Title** or **Duplicate Copy**.

Be sure to supply all the correct information for your newly duplicated title/copy. If you forget to modify a particular field, it will retain the information from the old title/copy that was duplicated.

Duplicate Title

Type over the value in the **Number of volumes** field if the title you are duplicating has more than one volume. Each new title will be assigned a new volume number; type over the values that differ to create your new title.

After you enter the **Number of volumes** you would like duplicated, click **OK**. A progress window appears to show the record is being duplicated.

When this has finished, the **Items** management window appears with your newly-duplicated title(s). If necessary, replace information in the duplicated fields of the **Title Information** tabs to modify your new title.

Duplicate Copy

Alexandria automatically defaults the **Beginning barcode** number based on the value you provided in the **Next Barcode** field of the **Items System Preference** window. Choosing **Duplicate Copy** changes the **Number of volumes** field to **Number of copies**. Enter the number of additional copies you need for this title. You can type over this value to change it.

After you enter the **Number of Copies** you would like duplicated, click **OK**. A progress window appears to show the record is being duplicated.

When this has finished, the **Items** management window appears with your newly-duplicated copy (or copies) added. If necessary, replace information in the duplicated fields of the **Copy Information** tabs to modify your new copy.

Step by Step: Duplicate Title

To duplicate a title:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon fastened to the **Tools** section below the **Item Records List**—to locate the title using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Title Information** tab.

Step 5. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 6. Choose **Duplicate** (Cmnd/Ctrl+D) from the primary or secondary **Actions** menu.

Step 7. Mark the radio button next to **Duplicate Title**.

Step 8. Enter the **Number of volumes** to add.

Step 9. Choose whether you would like to increment the volume number as you duplicate titles (e.g. *The Works of Edgar Allan Poe - Volume III* to *The Works of Edgar Allan Poe - Volume IV*).

Step 10. Finally, click **OK**.

Step by Step: Duplicate Copy

To duplicate a copy:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon fastened to the **Tools** section below the **Item Records List**—to locate the title using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Locate the copy that you wish to edit using the left and right arrow icons and **Browse Copies By:** (**Barcode**, **Copy ID**, **Copy Call Number**, or **Copy Sequence Number**) drop-down menu.

Step 5. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 6. Click on the **Copy Information** tab.

Step 7. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 8. Choose **Duplicate** (Cmnd/Ctrl+D) from the primary or secondary **Actions** menu.

Step 9. Click the radio button next to **Duplicate Copy**.

Step 10. If necessary, enter the **Beginning barcode** number and **Number of volumes** to add.

Step 11. Decide if you would also like to duplicate the **Copy Notes** and **Alerts Notes**.

Step 12. Choose whether you would like to increment the volume number as you duplicate copies (e.g. *Encyclopedia Brittanica - Volume 22* to *Encyclopedia Brittanica - Volume 23*).

Step 13. Finally, click **OK**.

Modifying Titles and Copies

NOTE:
Title records *must* be saved before you can view or modify copy information.

You can edit record information directly from the **Items** management window or in any of the tabs contained within the window. For example, you can place your cursor in a field with an existing value and replace or type additional information. You can also select (highlight) the entire value and type over it. Before records can be changed, they must be unlocked using the **Unlock** (Cmnd/Ctrl+U) command.

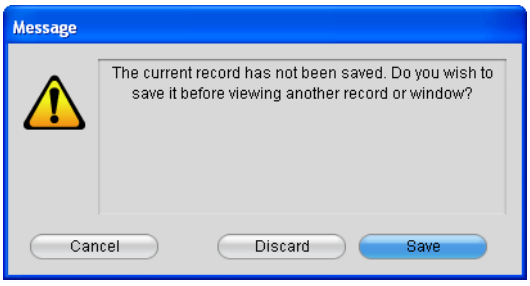
- NOTE-

If your system preferences are set to automatically lock records *(see page 80)*, you'll have to unlock the record by manually clicking on the "lock" icon from the upper left-hand side of the window or selecting **Unlock** (Cmnd/Ctrl+U) from the **Items** menu before you can make changes to the record.

To modify record information, click on the **Title/Copy Information** tab(s) or **Find** (Cmnd/Ctrl+F) the item you would like to modify.

When you have modified all the necessary record information you want, click the **Save** button in the upper-right corner of the window. The record is now saved. If you want to ignore the information you have entered, click **Revert** to discard your changes.

Depending on your **Automatically Save when Closing/Deactivating a Window** preference *(see page 80)*, if you try to leave the **Items** management window without saving your changes, the following warning appears:


Message
The current record has not been saved. Do you wish to save it before viewing another record or window?
Cancel
Discard
Save

Click the **Cancel** button to return to the **Items** management window with your changes still intact. Click the **Discard** button if you want to ignore all of the information you've entered. Click the **Save** button or `<enter>` to save your changes.

Step by Step: Modify Title

To modify title information:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Select **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon fastened to the **Tools** section below the **Item Records List**—to locate the title using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Title Information** tab.

Step 5. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 6. Make any desired changes to the fields in the record, moving between **Publication**, **Subjects**, **Terms**, **Notes**, **Summary**, **Statistics**, **Links**, and **SP** tabs.

Step 7. When all the appropriate information has been modified, click **Save** in the upper-right corner of the **Items** management window.

Step by Step: Modify Copy

To modify copy information:

Step 1. Choose **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Select **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon fastened to the **Tools** section below the **Item Records List**—to locate the copy using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Copy Information** tab.

Step 5. Locate the copy that you wish to edit using the left and right arrow icons and **Browse Copies By:** (**Barcode**, **Copy ID**, **Copy Call Number**, or **Copy Sequence Number**) drop-down menu.

Step 6. Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 7. Make any desired changes to the fields in the record, moving between the **Copy Info** and **Copy Notes** tabs.

Step 8. When all the appropriate information has been modified, click **Save** in the upper-right corner of the **Items** management window.

Removing Titles and Copies

Items that have been discarded, given to other libraries, sold, or permanently lost must be removed from the system to keep reports and searches from becoming cluttered with obsolete information. However, be sure that the items you are removing should be permanently expunged from your collection.

For example, a lost item may eventually be found or returned. In this case, it is better to record those items as **Lost**, **Discarded**, **On Repair**, **Archived**, or **Unknown**. These special item categories allow you to keep track of items that may eventually return to your library *(see "Special/System Patrons" on page 219)*. COMPanion recommends that you only remove items that *may* never return to your collection.

When a title is removed, all associated information is also removed. A title that has a copy checked out to a patron *cannot* be removed. However, copies that are checked out to the **Lost**, **Discarded**, **On Repair**, **On Order**, **Archived**, or **Unknown** patrons *can* be removed.

Use the **Remove Title** ("**—**") button or command (Cmnd/Ctrl+Shift+R) from the primary **Actions** menu to permanently remove the selected/current title and all its copies.

The **Remove Copy** command is only available when there are copies belonging to the main title record. Selecting this option from the secondary **Actions** menu will remove the currently selected copy whether it is lost or available.

- WARNING -

Removing items is permanent and cannot be undone. If you remove an item in error, you will have to re-enter the information or recover it from a backup copy of your data. If you need to report on items that are lost or discarded for the year, you should check those items out to the corresponding "special patron." Run all necessary reports (such as **Super Summary**) before removing these items. Once they are removed, they are unavailable for any future reports.

Step by Step: Remove Title

To remove a title:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon fastened to the **Tools** section below the **Item Records List**—to locate the item using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Use the **Remove Record** ("**—**") button or (Cmnd/Ctrl+R), or select **Remove Record** from the primary **Actions** menu.

Step 5. A warning window will ask you to verify that you want the title record permanently removed. Click the **Remove** button to permanently remove the title or the **Keep** button to prevent the remove request.

Step by Step: Remove Copy

To remove a copy:

Step 1. Select **Items** (Cmnd/Ctrl+I) from the main **Show** drop-down menu.

Step 2. Choose **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu—or use the magnifying glass icon fastened to the **Tools** section below the **Item Records List**—to locate the copy using the **Item Selection** window.

Step 3. Once the correct title has been found, it will appear in the **Current Item Record** pane.

Step 4. Click on the **Copy Information** tab.

Step 5. Locate the copy that you wish to edit using the left and right arrow icons and **Browse Copies By:** (**Barcode**, **Copy ID**, **Copy Call Number**, or **Copy Sequence Number**) drop-down menu.

Step 6. Select **Remove Copy** (Cmnd/Ctrl+Shift+R) from the secondary **Actions** menu.

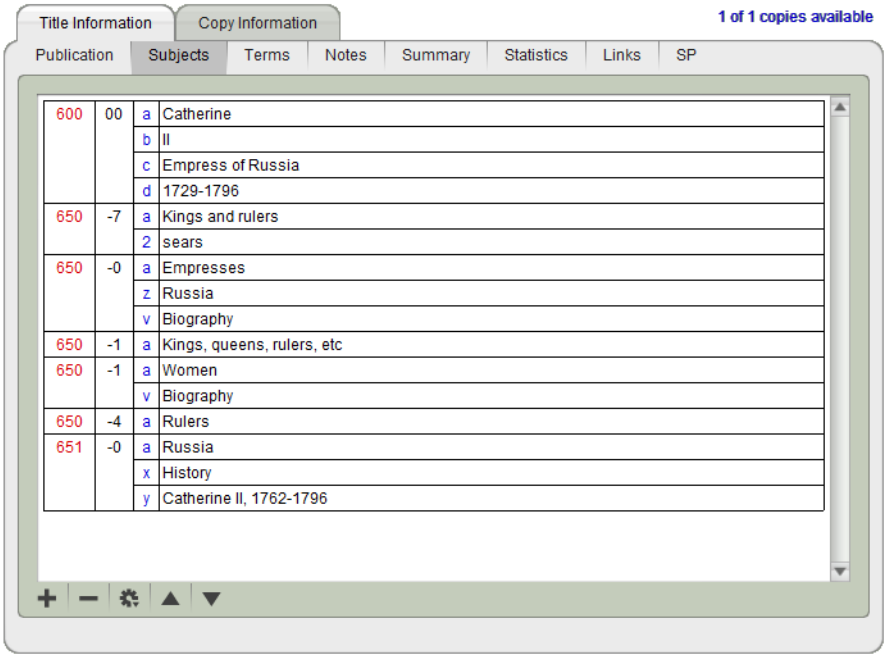
Step 7. A warning window will ask you to verify that you want the copy record permanently removed. Click the **Remove** button to permanently remove the copy or the **Keep** button to prevent the remove request.

Step 8. Click **Save** in the upper-right corner of the **Items** management window to save your changes to the main title record.

Title, Author, and Subject Editor

- The **Title** and **Author Editor** windows can be accessed from **Actions** menus which are located to the right of the respective entry fields. Using these editors, you can easily enter multiple, detailed subfields and new tags to any item.

- The **Title Editor** enables you to add uniform titles, etc.
- Use the **Author Editor** to add illustrators, editors, additional authors, translators, and more to the title record.
- The **Subject Editor** subtab under the main **Title Information** tab provides an easy way of adding additional subject tags.



- For more information on the **Title**, **Author**, or **Subject Editor**, please review the corresponding sections of Alexandria's Online Help.

Notes:

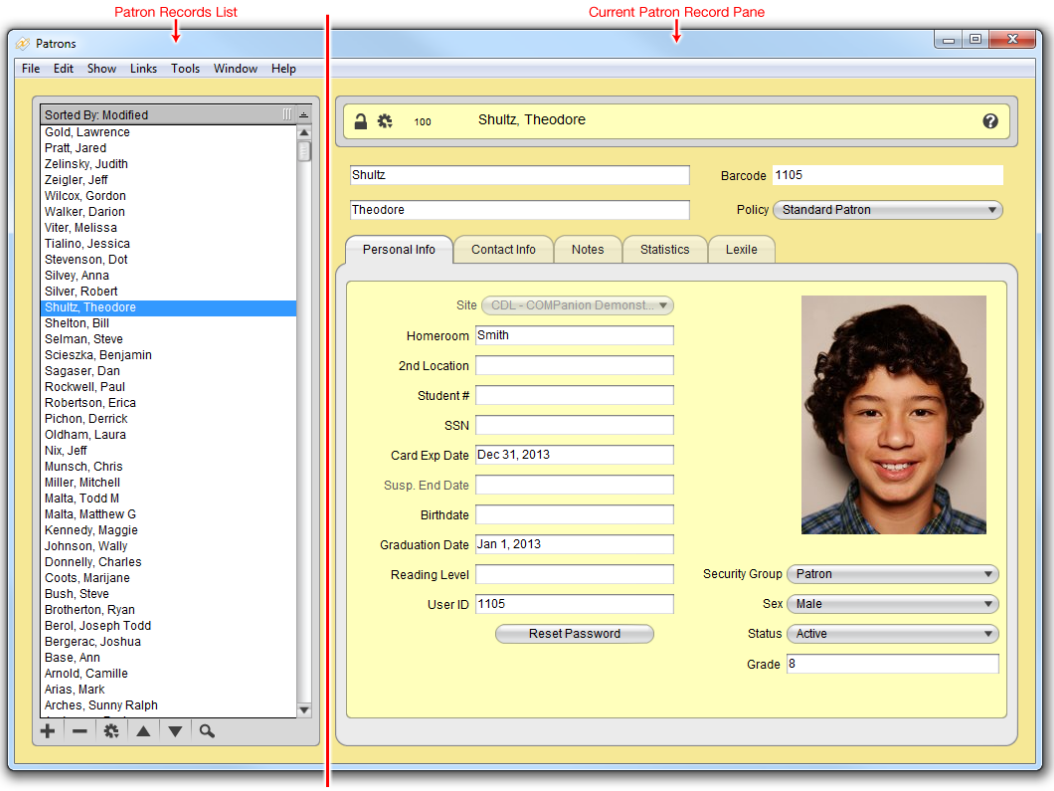
Patron Management

The **Patrons** management window contains information about the patrons (students) and operators (employees) who frequent your establishment (site, school, or library). Using commands found in this window's primary and secondary **Actions** menus, you can view, create, duplicate, modify, and remove patron and operator records—each belonging to unique (or identical) security groups.

The Patrons Management Window In More Detail

To open the **Patrons** management window, select **Patrons** (Cmnd/Ctrl+L) from the main **Show** menu. When the **Patrons** management window appears, notice that it is split into two distinct areas:

- The left hand side of the **Patrons** management window belongs to the **Patron Records List**—essentially a list that contains all the names of your patrons and operators; used also for browsing these records and other related tools. You may select (highlight) any of the names within this field in order to edit their information or remove them completely.
- The larger, right-hand portion of the **Patron Management** window consists of the **Current Patron Record** pane where the selected patron (or operator) record is displayed in full, along with associated **Tools** that help perform operations on said record.



Patron Records List and Associated Tools

The left-hand section of the **Patrons** management window contains the **Patron Records List** pane, where all patron records matching an operator's **Find** (Cmnd/Ctrl+F) selection criteria are displayed in a user-specified **Sort By** order *(review the **Patron Selection** window on page 261 for more information)*. Highlighting/selecting a name in the **Patron Records List** will make that patron (or operator) record current in the right-hand section of the **Patrons** management window.

Navigating the Site Records List

Use the **Patron Records List** to browse through individual records, starting with the patron or operator record that is currently selected (i.e. highlighted).

Selecting (highlighting) a specific patron from the **Patron Records List** will make that record *current* in the right-hand section of the **Patrons** management window.

If you need to select a patron record preceding or following the one that is currently highlighted, use the options listed below to move backwards and forwards through the records:

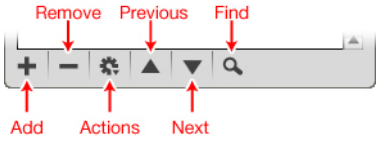
- To move to the previous record, either click on the up arrow icon or choose **Previous** under the **Actions** menu in the tools section of the window. If you prefer using keyboard shortcuts, you can use (Cmnd/Ctrl+]); these commands are shown to the right of the **Previous** menu selection in the **Actions** drop-down menu.
- To move to the next site, either click on the down arrow icon or choose **Next** under the **Actions** menu in the tools section of the window. If you prefer using keyboard shortcuts, you can use (Cmnd/Ctrl+[ ); these commands are shown to the right of the **Next** menu selection in the **Actions** drop-down menu.
- Alternately, use the <up> or <down> arrow keys to move *up* and *down* through the list
- Stop on the patron or operator record that you want to view, remove, duplicate, or modify.

- NOTE-

The **Previous** (Cmnd/Ctrl+[ ) or **Next** (Cmnd/Ctrl+]) commands are determined by the record that you are currently viewing. For example, if you change the patron or operator's name, choosing **Next** will take you *next* last name (in last name order) *after* the changed last name—not what the last name was *before* the change.

Associated Tools of the Patron Records List

The area situated below the **Patron Record List** field contains several tools icons that are used for adding, removing, browsing, and finding patron records; for more information, please review the **Patrons** management section of Alexandria's **Online Help**.

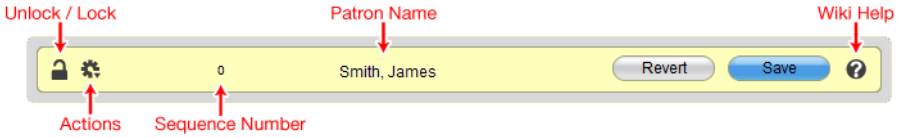


Current Patron Record Pane

The right-hand section of the **Patrons** management window is dedicated to the current patron record, which displays the full details of the record selected from the **Patrons Record List** pane on the left.

The patron (or operator) record you are presently viewing is called the *current patron*. Switching from the **Patrons** management window to the **Circulation** window will make *that* patron appear current in the **Circulation** management window. Likewise, if you have an operator or patron current in the **Circulation** window and then activate the **Patrons** management window, their record information will be displayed.

At the top of the **Current Patron Record** pane is a long, rectangular area used for displaying record status information; **Save** and **Revert**, the **Online Help** icon, the **Lock/Unlock** icon and a second **Actions** icon which contains functions specific/unique to the current record.



Unlock/Lock Icon—Before records can be modified, they must first be unlocked. For example, when the **Patrons** management window is opened, the default state of the window is "locked". When locked, records can be viewed but *not* modified; this prevents you (or others) from making unintentional changes to your data. Clicking on the lock icon unlocks the window; it stays unlocked until the operator clicks on the lock icon again or the window is closed.

- To *unlock* a record, click on the **Lock** icon at the top left of the **Patrons** management window to change it to an **Unlocked** icon or press (Cmnd+M) (on Macintosh) or (Ctrl+M) (on Windows) until the icon shows as unlocked.
- To *lock* a record, click on the **Unlock** icon at the top-left of the **Patrons** management window to change it to a **Locked** icon or press (Cmnd+M) (on Macintosh) or (Ctrl+M) (on Windows) until the icon shows as locked.

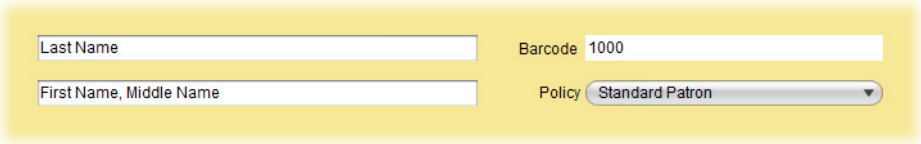
Actions—This gear/cog menu contains record-specific actions and other tools that don't fit as well with the **Add**, **Remove**, and **Find** functions offered in the primary **Current Patron Records List Actions** menu; for more information, please review the **Patrons** management section of Alexandria's **Online Help**.

Sequence Number—This is a unique number assigned to new patrons (or operators) by the program. This number is useful for browsing by order of entry.

Online Help—This button opens your default web browser to the **Patrons** management section of Alexandria's **Online Help**.

Current Record Pane (Continued)

The top of the **Current Patron Record** pane (directly below the window's secondary **Actions** pane) contains the fields for full patron name, barcode, and policy. This portion of the **Patrons** management window is *always* visible regardless of what tab (e.g. **Personal Info**, **Contact Info**, **Notes**, etc.) you have selected.



The fields that top the **Current Patron Record** pane of the **Patrons** window are as follows:

Patron First & Middle Name—Enter the first and middle name (or the first name and middle initial) of the patron or operator; for example, "`John Luke`".

Patron Last Name—Enter the patron or operator's last name. This field is required, you *cannot* save a patron record without a last name.

Patron Barcode—Each patron (or operator) will be assigned a barcode number that is either supplied by the program or entered manually. This barcode can contain up to 15 digits and *must* be unique. It may contain numbers and/or letters, but *no* punctuation marks or spaces.

However, if you attempt to manually enter a patron or operator barcode number that is less than *three* alphanumeric characters, Alexandria will warn you and disable the **Save** feature until you have increased the barcode number. This field is required, you *cannot* save a record without a unique barcode.

Patron Policy—The policy that you assign to a patron (or operator) determines the site rules by which this patron must adhere. To choose a policy for a patron, click the arrow at the end of the **Policy** drop-down menu and select a value. By default, the policy for new patrons or operators is **Standard Patron**. However, you can change which policy is automatically assigned by configuring your settings in the **Patrons** tab of your **Patrons** Site Preferences *(see "Site Preferences: Patrons tab" on page 118).*

Current Record Tabs

The largest portion of the **Current Patron Record** pane belongs to the **Patrons** management tabs; these tabs contain the editable fields, drop-down menus, and checkboxes that are essential to managing information related to the patrons and operators in your school or district. To bring a particular tab into view, click on the tab header.

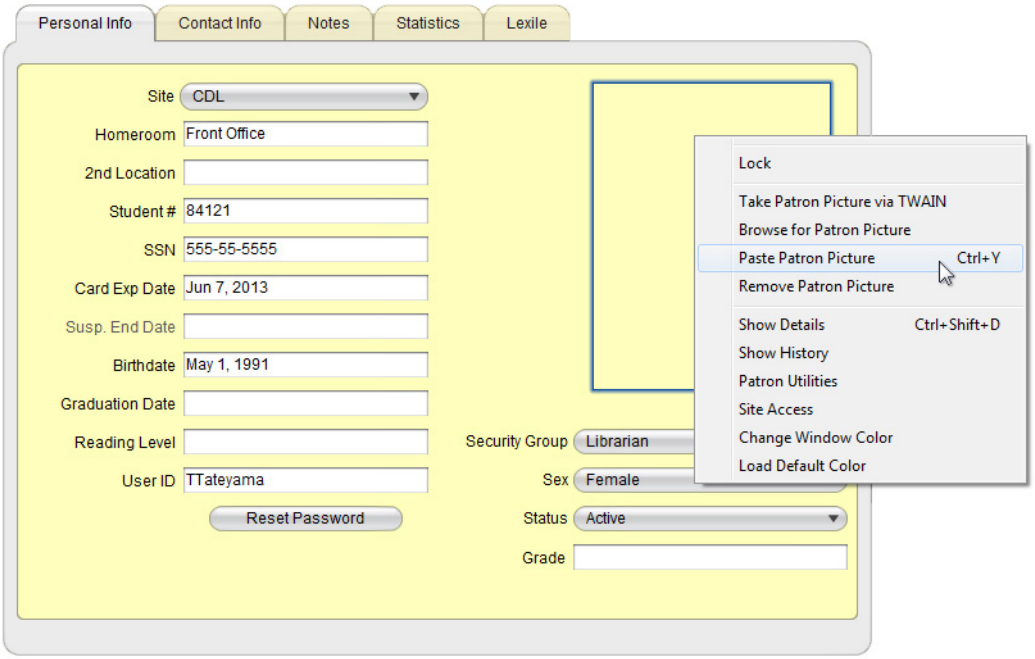
Further information can be found in the *"Patron Management"* section of Alexandria's **Online Help**.

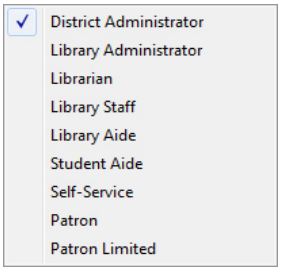
Adding Operators

We strongly recommend that some of the very first operators you create be your **District** and **Library Administrators**. However, because you have the built-in **System Administrator Special Operator** (barcode 10) *(see page 219)* with the default **Security Group** of **District Administrator**, this isn't required. Regardless, don't forget to create a **User ID** and **Password** for your **District** or **Library Administrators** operators since they are used to examine, edit, add, or delete other patrons, operators, and address books.

Use the **New Record** (Cmnd/Ctrl+N) command, button ("**+**"), or corresponding selection from the **Actions** menu to add a new operator to your database. When you perform or select the **New Record** command, a blank **Patrons** management window will appear.

To move to the *next* blank data entry field, drop-down menu, or button, press the `<tab>` key. To move to the *previous* blank data entry field, drop-down menu or button, press `<shift-tab>`. To edit information in a particular data entry field, click in the associated field. To change a selection in a drop-down menu using only your keyboard, use the `<up>` and `<down>` arrow keys when the drop-down menu is outlined with a blue focus ring. When a button is outlined and you wish to perform that action, press the `<spacebar>`.





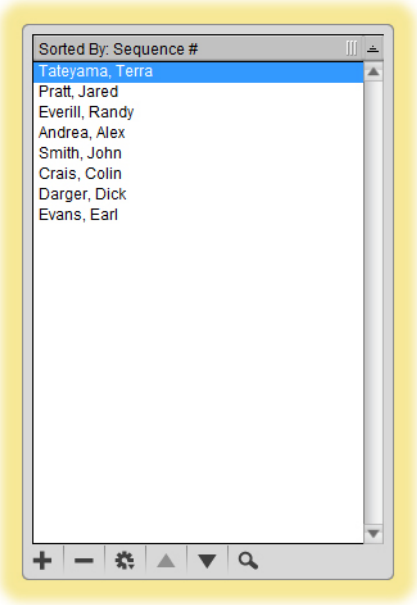
Initially, you are allowed to select one of these default operator security levels.

You will need to fill in *all* the necessary fields (such as first and last name, address, and so forth), make selections from drop-down menus, and checkmark boxes in each of the **Patrons** management **Current Record** tabs to successfully add new operator records.

- Since both operators *and* patrons are stored in the database by **User ID**[1] and **Barcode** number, you are allowed to have patrons and operators with duplicate first/last names and **Security Groups**.
- Although only the **Barcode**[2] and **Last Name** fields are required when creating a new operator, COMPanion also suggests that you provide a unique **User ID**[3], **Password**[4], **Email** address, and an appropriate **Security Group** level (other than **Patron**). Using the **Site Access** selection from the secondary **Actions** drop-down menu, place a blue checkmark next to the sites that your operator is permitted to access.
- We also suggest administering a user-defined **Policy** and **Status**. Assigning the correct operator **Policy** is important because you may want operator records to appear differently in your statistical reports.
- Except for **Password**[5], **User ID**, and **Barcode**, none of these fields are defaulted. Alexandria automatically assigns a barcode number based on the value you've provided in the **Next Barcode** field of the **Patron Site Preferences** window *(see page 118)*.
- Alexandria will automatically copy the **City**, **State**, **Postal Code** and **Country** from your site address (see the **Sites** management window on page 51) for the new operator. You may type over these values to change them.
- Because you have the built-in **System Administrator Special Operator** (barcode 10) *(see page 49)* with the default **Security Group** of **District Administrator**, your very first operators can have access levels other than **District** or **Library Administrator**. Remember, the **System Administrator Special Operator** (barcode 10) can *not* be removed and its **Security Group** can *not* be changed from the **District Administrator** setting. Otherwise, however, the **Special Operator** can be modified just like any other **System Patron** *(see page 219)*. The **District Administrator** security setting is only meaningful for multi-library collection licenses (Central Union, WAN, etc.); for all other licenses, the **District Administrator** security group is analogous to the **Library Administrator**.
- By default, any operator with access to **Security System Preferences** will only be able to modify **Security Groups** below their own. For example, an operator with **Librarian**-level security access may be allowed to modify preferences; however, they are unable to change the **Librarian**, **Library Administrator**, or **District Administrator Security Groups**.
- We *strongly* encourage attaching pictures of your operator to their patron record; instructions for doing this can be found on page 274.

1.**User ID**s, however, *must* be unique!
2.When adding *new* operators, the **Next Barcode** value will be used (see page 118).
3. If you choose a **User ID** that is already in use, Alexandria will ask you to choose another.
4.Passwords are *not* case sensitive; upper and lowercase characters match. Also, the **Password** field may *not* be left blank.
5.By default, the **Password** will be the operator's last name.

Once you have provided all the necessary information for your operator, click the **Save** button in the upper-right corner of the **Patrons** management window. If you want to discard the information you have entered, click the **Revert** button and the previous patron record will be displayed. Clicking the **Save** button causes the new operator **Name** to appear in the **Patron Records List** pane of the window (as shown below).



Near the end of this chapter *(page 276)* you'll find step-by-step instructions on how to *only* view operator records in the **Patron Records List** pane (as shown in the screenshot above).

NOTE:
Using import utilities, you can quickly import *many* operators if you have their data in electronic format.

See page 155 for more information.

Step by Step: Adding Operators

To add a new operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. The **Patrons** management window will appear.

Step 3. Use the (Cmnd/Ctrl+N) command to add a new operator record to your database.

- or -

Click the ("**+**") button located near the bottom of the **Patron Records List** pane.

- or -

Choose **New Record** (Cmnd/Ctrl+N) from the primary **Actions** menu.

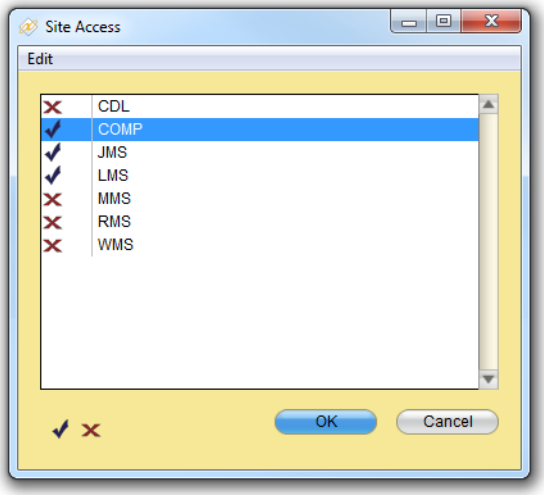
Step 4. The **Patrons** management window will appear with blank fields, some of which are required in order to save your new operator. Remember, the *very first* operator you create should be a new **District** or **Library Administrator**, disavowing your reliance on the **System Administrator Special Operator** (barcode 10) *(see page 49)*.

Step 5. Move between the **Personal Info** and **Contact Info** tabs, making changes to the operator record as needed. If your new operator is also a patron, you *may* need to supply additional information and configure options in the **Notes**, **Statistics**, and **Lexile** tabs.

Step 6. At the very least, **Last Name**, **Barcode**, and a **Security Group** (other than **Patron**) are *required* to save your new operator. However, we suggest you also provide a unique **User ID**, **Password**, and contact **Email** address during the creation of your operator.

Step 7. Additionally, you can supply your new operator's **Policy**, **Status**, and **Sex**.

Step 8. Next, use the **Site Access** selection from the secondary **Actions** drop-down menu to make the **Site Access** window appear. Checkmark (i.e. click on) the sites that your new operator is permitted to access.



Step 9. Click the **Save** button to add your new operator record to the database or click the **Revert** to discard them.

Modifying Operators

First, select (i.e. highlight) the name of the operator whose information you want modified in the **Patron Records List** pane. Doing so displays the currently selected operator record in the **Patrons** management window. From here, you may change any of the operator information fields.

> **- NOTE-**
>
> While you are unable to remove the **System Administrator Special Operator** (barcode 10), you *are* allowed—and even *advised*—to use the **Reset Password** button to change the default password for this **District**-level operator *(see page 219)*.

Before operator records can be modified, they must first be unlocked by clicking on the **Lock** icon or by using the **Unlock** (Cmnd/Ctrl+U) command.

Once the record is unlocked, you can edit the **User ID**, **Reset Password**, **Email** address, and **Security Group** of *any* existing operator record directly from the **Current Record** tabs of the **Patrons** management window. Similarly to elsewhere in the program, you can place your cursor in any field with an existing value and either provide additional information or highlight (i.e. select) and replace it completely.

This method of modifying information is best suited when editing an individual operator record; if you want to modify information for several operators, use the appropriate **Patron Utilities**.

Step by Step: Modifying Operator Records

To modify an existing operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patrons** management window.

Step 3. From the main **Edit** drop-down menu choose **Find** (Cmnd/Ctrl+F).
- or -
Click the **Find** icon located near the bottom of the **Patron Records List** pane.
- or -
Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.
Any of these will open the **Patron Selection** window.

Step 4. Using the **Patron Selection** window, provide qualifying information about the operator (e.g. **First**/**Last Name** or **Barcode**) and press <enter>.

Step 5. If results—multiple or exact—are located for your search, the **Patron Records List** pane of the **Patrons** management window will be populated with operator record(s) that most closely match the information you provided.

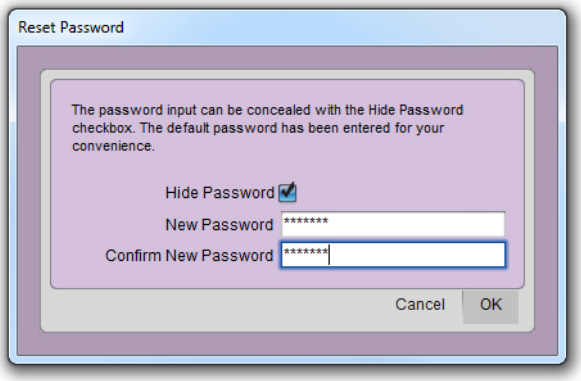
Step 6. Unlock the operator's record by clicking the **Lock** or by performing the **Unlock** (Cmnd/Ctrl+U) command.

Step 7. Move between the **Personal Info** and **Contact Info** tabs, making changes to the operator record as needed. To move to the next data entry field, press the <tab> key. To move to

the previous data entry field, press <shift-tab>. To select a data entry field to edit, place your cursor in that field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

Step 8. You can change the operator's name in the **User ID** field. If you try to save an operator record with a **User ID** that is already in use (e.g. TTateyama), an alert window will appear, prohibiting the change.

Step 9. If needed, click the **Reset Password** button to open the **Reset Password** window. Use the **New Password** and **Confirm New Password** fields to change the operator's password; the password is concealed when the **Hide Password** box is checked. The default password (e.g. the operator's **Last Name**) has been entered for your convenience. You can make this password much more secure by mixing different types of characters; use some uppercase letters along with lowercase letters, numbers and even special characters such as "&" or "%". Click **OK** to save or **Cancel** to abort.



Step 10. You can change or assign a new security group for the operator using the **Security Group** drop-down menu.

Step 11. In the **Contact Info** tab, you can change or supply a new **Email** address for the existing operator.

Step 12. When you have finished modifying your operator record information, click the **Save** button in the upper-right corner of the **Patrons** management window to save your changes. If you want to forfeit the information you have entered, click the **Revert** button to restore the previous record and discard your changes. You won't be able to select another operator record or close the **Patrons** management window until you **Revert** or **Save** your current changes.

Duplicating Operators

Use the **Duplicate** (Cmnd/Ctrl+D) command to make a copy of an existing operator record. You can then modify the duplicated information to create a new operator. This will save valuable data entry time when you add operators that have identical information such as **Location**, **Policy**, **Security Group**, and **Status**.

When you select the **Duplicate** (Cmnd/Ctrl+D) command, the **Patrons** management window will appear with information copied from the previously selected operator record. Alexandria will have automatically assigned the **Next Barcode** value *(see **Patrons Site Preferences** on page 117)* rather than duplicating the barcode from the original record. Replace any existing information in the tabs and fields of the **Patrons** management window with information specific to the newly duplicated operator.

Step by Step: Duplicating Operators

To duplicate a operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. From the **Actions** menu, choose **Duplicate Record** (Cmnd/Ctrl+D).

Step 3. The **Current Patron Record** pane of the **Patrons** management window will appear with duplicated operator information except for barcode and statistics.

Step 4. Move between the **Personal Info** and **Contact Info** tabs, making changes to the operator record as needed.

Step 5. Use the drop-down menus to indicate **Policy**, **Status**, and **Sex** (i.e. gender) for the operator.

Step 6. Select the **Notes** tab to add any (optional) operator alerts.

Step 7. Click the **Save** button.

Removing Operators

There are times you may need to remove an operator from your system. Removing operators who are no longer employed at your library will help ensure the accuracy of your reports.

- WARNING -
Before you remove *any* patron(s), archive your database! Removing a patron is permanent and *cannot* be undone! If you mistakenly remove a patron, you will have to re-enter all their information from scratch or recover it from an archive of your data.

To permanently remove an operator, select (highlight) the operator name from the **Patron Records List** pane and choose **Remove Record** (Cmnd/Cmnd+R) from the primary **Actions** menu or click the **Remove Record** ("**—**") button; when asked if you wish to delete the operator, choose **Yes**.

Just as with patrons, when an operator record is removed, all associated operator information is also removed. For example, removing an operator also deletes all the history and statistics that operator has accumulated. An operator who has items checked out can *not* be removed until all items have been returned to the library or recorded as **Lost**.

Step by Step: Removing Operators

To remove an operator record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patrons** management window.

Step 3. Choose **Find** (Cmnd/Ctrl+F) from the main **Edit** drop-down menu.
- or -

Step 4. Click the **Find** button located near the bottom of the **Patron Records List** pane.
- or -
Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.
Any of these will open the **Patron Selection** window.

Step 5. Using the **Patron Selection** window, provide qualifying information about the operator (e.g. **First**/**Last Name** or **Barcode**) and press `<enter>`.

Step 6. If results—multiple or exact—are located for your search, the **Patron Records List** pane of the **Patrons** management window will be populated with operator record(s) that most closely match the information you provided.

Step 7. Select (highlight) the proper operator in the **Patron Records List** pane.

Step 8. From the primary **Actions** menu, choose **Remove Record** (Cmnd/Cmnd+R) or click the **Remove Record** button ("**—**").

Step 9. When asked if you wish to permanently remove the patron, click **Remove**; if you decide against removal, click **Keep**.

Step 10. Just like patrons, an operator *cannot* be removed if they have items checked out.

Step 11. Use caution; if an operator has any outstanding fines or charges, removing them will also clear their fines from the system.

Adding Patrons

Use the **New Record** (Cmnd/Ctrl+N) command, ("**+**") button, or corresponding selection from the primary **Actions** menu to add a new patron to your database. When you select the **New Record** command, a blank **Patrons** management window will appear.

Provide all the necessary information using text fields (such as first and last name, address, and so forth), make selections from drop-down menus, and checkmark boxes in each of the **Patrons** management tabs. Alexandria will automatically copy the **City**, **State**, **Postal Code** and **Country** from your site address (see the **Sites** management window on page 51) for the new patron. You may type over these values to change them.

To move to the *next* blank data entry field, drop-down menu, or button, press the <tab> key. To move to the *previous* blank data entry field, drop-down menu or button, press <shift-tab>. To edit information in a particular data entry field, click in the associated field. To change a selection in a drop-down menu using only your keyboard, use the <up> and <down> arrow keys when the drop-down menu is outlined with a blue focus ring. When a button is outlined and you wish to perform that action, press the <spacebar>.

The **Barcode**, **Last Name**, **Policy**, **Status**, and **Password** fields are all required in order to create a new patron record. All of these fields—except for **Password** and **Last Name**—are defaulted[1]. Alexandria automatically assigns a barcode number based on the value you've provided in the **Next Barcode** field of your **Patron Site Preferences** window *(documented on page 113)*.

Be sure to assign the appropriate **Policy** so that patrons appear correctly in your statistical reports.

By default, newly created patrons (i.e *not* operators) are assigned the **Patron Security Group** level; this level doesn't allow access to the Data Station (i.e. administration or operator) side of the program.

When you have supplied all of the information required for this patron, click the **Save** button in the upper-right corner of the **Patrons** management window. If you want to discard the information you have entered, click the **Revert** button.

NOTE:
Using import utilities, you can quickly import *many* patrons if you have their data in electronic format.

See page 155 for more information.

1.The default **Password** is the patron's last name.

Step by Step: Adding Patrons

To add a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. Use the (Cmnd/Ctrl+N) command to add a new patron record to your database.

- or -

Click the ("**+**") button located near the bottom of the **Patron Records List** pane.

- or -

Choose **New Record** (Cmnd/Ctrl+N) from the primary **Actions** menu.

Step 3. Move between the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs, providing information and making changes to the patron record as needed.

Step 4. Use the drop-down menus to indicate **Policy**, **Status**, and **Sex** (i.e. gender) for the patron.

Step 5. Select the **Notes** tab to add any (optional) patron alerts.

Step 6. When all of the appropriate information has been supplied, click **Save** in the upper-right corner of the **Patrons** management window.

Duplicate Patrons

Use the **Duplicate** (Cmnd/Ctrl+D) command or selection from the primary **Actions** drop-down menu to make a copy of an existing patron. You can then modify information for the newly created patron. This will save valuable data entry time when you are adding patrons that have identical information (such as location, graduation date, policy, and status).

When you select the **Duplicate** (Cmnd/Ctrl+D) command, the **Patrons** management window will appear with information copied from the *previously* selected patron. Alexandria will have automatically assigned the **Next Barcode** *(see "Patrons Preferences" on page 113)* rather than duplicating the barcode from the original patron record. Replace any information in the tabs and fields of the **Patrons** management window with information specific to the newly duplicated patron.

Step by Step: Duplicating Patrons

To duplicate a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. From the primary **Actions** menu, choose **Duplicate Record** (Cmnd/Ctrl+D).

Step 3. Provide necessary (and accurate) information about this patron in the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs; be sure to indicate policy, status, gender, and any alert notes for the patron.

Step 4. When all the appropriate information has been supplied, click **Save** in the upper-right corner of the **Patrons** management window.

Modifying Patrons

You can edit information in the tabs and fields of the **Patrons** management window the same way you would anywhere else in Alexandria. For example, you can place your cursor in a field with an existing value and replace or type additional information. You can also select (highlight) an entire value and type over it. Before records can be changed, they must be unlocked using the **Lock** icon or **Unlock** (Cmnd/Ctrl+U) command.

This method of modifying information is best suited when editing an individual patron record; if you want to modify information for several patrons, use the appropriate **Patron Utilities** *(see "Performing Utilities" on page 203 for more information)*.

Step by Step: Modifying Patrons

To modify a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. Select **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu or the primary **Actions** menu—or use the magnifying glass icon—to locate the patron using the **Patron Selection** window.

Step 3. On the **Patron Selection** window, type in the patron's name and press `<enter>`.

Step 4. Once the correct patron has been found, they will appear in the **Current Patron Record** pane.

Step 5. Unlock the patron record, if necessary, by clicking the **Lock** icon or choosing **Unlock** (Cmnd/Ctrl+U) from the secondary **Actions** menu.

Step 6. Make any desired changes to the fields in the record, moving between the **Personal Info**, **Contact Info**, **Notes**, **Statistics**, and **Lexile** tabs.

Step 7. When you have finished modifying your patron record information, click the **Save** button in the upper-right corner of the main **Patrons** management window to save your changes. If you want to forfeit the information you have entered, click the **Revert** button to restore the previous record and discard your changes. You won't be able to select another record or close the **Patrons** management window until you **Revert** or **Save** your changes.

Step 8. If you try to save a patron record with a barcode that is already in use (e.g., `1001`), an alert window will appear, prohibiting the change. Use this alert window to find an unique and unused barcode, enter a different barcode, view the patron with the original barcode, or **Cancel** to return to the patron record with the improper barcode.

Removing Patrons

There are times you may need to remove a patron from your system. Removing patrons who no longer use your library helps to ensure the accuracy of your reports; therefore, use the **Remove** (Cmnd/Ctrl+R) command to permanently remove the current patron.

- WARNING -
Before you remove *any* patron(s), archive your database! Removing a patron is permanent and *cannot* be undone! If you mistakenly remove a patron, you will have to re-enter all their information from scratch or recover it from an archive of your data.

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations that the patron has pending. A patron with items checked out *cannot* be removed until all items have been returned to the library or recorded as **Lost**.

Step by Step: Removing Patrons

To remove a patron record:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the main **Show** drop-down menu.

Step 2. Select **Find** (Cmnd/Ctrl+F) from the **Edit** drop-down menu or the primary **Actions** menu—or use the magnifying glass icon—to locate the patron using the **Patron Selection** window.

Step 3. Using the **Patron Selection** window, provide qualifying information about the patron (e.g. **First**/**Last Name** or **Barcode**) and press `<enter>`.

Step 4. If results—multiple or exact—are located for your search, the **Patron Records List** pane of the **Patrons** management window will be populated with patron record(s) that most closely match the information you provided.

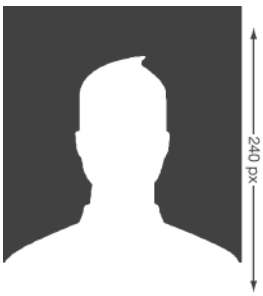
Step 5. Select (highlight) the ill-fated patron from the **Patron Records List** pane.

Step 6. From the primary **Actions** menu, choose **Remove Patron** (Cmnd/Ctrl+R) or click the **Remove Patron** button ("**—**").

Step 7. Patrons *cannot* be removed if they still have items checked out.

Step 8. If a patron has any outstanding fines or charges, removing them will also clear their fines from the system.

Step 9. Alexandria will verify that you'd like to permanently remove the selected patron. Click **Remove** to delete them or **Keep** to retain them in your database.



The optimal size for patron pictures is *240* pixels by *186* pixels at *72* ppi (pixels per inch) resolution.

Adding Patron or Operator Pictures

You can use most standard image files to add patron pictures to the patron record. Some viable picture formats include *GIF*, *BMP*, *PIC*, *PNG*, and *JPG*. Although they can be larger (or smaller), the default, optimal size for patron pictures is *240* pixels by *186* pixels at *72* ppi (pixels per inch) resolution. Larger images will be auto-sized and shrunk to fit within those pixel specifications if they're revealed to be too large upon import.

Although they can also turn up elsewhere (e.g. **Patron Details** and **Patron Reports**), patron pictures primarily appear in the **Current Patron** pane of the main **Circulation** window and the **Patrons** management window's **Personal Info** tab.

When a patron picture is applied to an individual patron record, it will supersede any default patron pictures configured in your **Default Pictures Site Preferences**; if the individual patron picture is removed from the record, it will revert back to the default.

The two methods described below are best suited to applying one picture at a time to an individual record; if you want to add pictures for a large group of patrons, use the **Import Patron Pictures** functionality *(see page 155)*.

- **Drag and drop—** Drag the patron picture from your operating system desktop into the patron picture field of the **Patrons** management window's **Personal Info** tab. Larger images will be auto-sized and shrunk (or stretched) to fit the *240 x 186* pixel specifications if they're revealed to be too large (or small).

- **Paste and Copy Operator Picture**[1] **—** If you have a picture on your operating system clipboard, the **Paste Patron Picture** (Cmnd/Ctrl+Y) command will paste it into picture field of the **Personal Info** tab

Either method you choose, the operator picture should now appear in the right-hand area of the **Personal Info** tab. For more information on how to locate patrons, browse for picture files on your computer, or paste/remove patron pictures, please review the *"Patron Pictures"* section of Alexandria's **Online Help**.

1.Windows operators are required to have Apple's QuickTime installed to view some picture formats.

How to Find Patrons and Operators

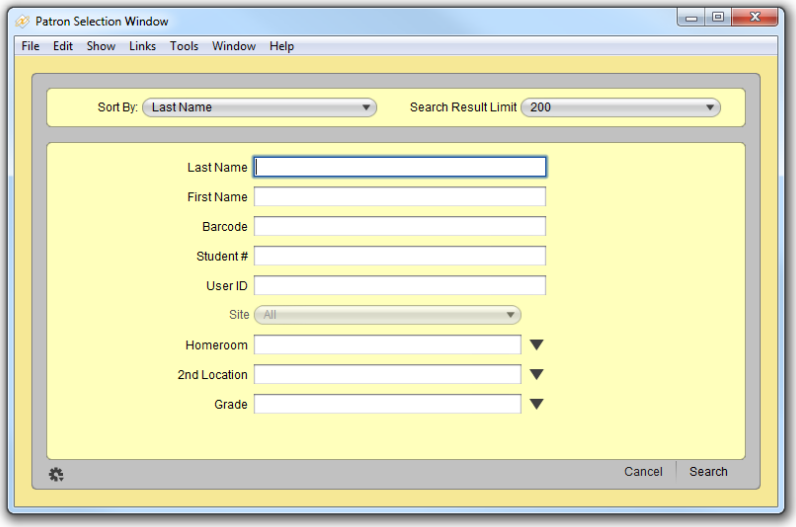
The **Find** (Cmnd/Ctrl+F) command under the primary **Actions** menu—or magnifying glass icon—opens the **Patron Selection** window. This window is used to search for and locate specific patrons (or operators) in your database that starts with (or exactly matches) the information you provide.

For example, if you are looking for a patron with the last name "`Anderson`," every patron record that closely (or exactly) matches that last name will be selected (in alphabetical order) and displayed in the **Patron Records List** of the **Patrons** management window; the patron placed at the top of the list is chosen as the **Current Patron**. If no record can be located, an audible alert will sound and the *current record* will not be changed.

By default, the **Patron Selection** window opens in **Simple** mode; however, an **Advanced** mode *can* be accessed from the window's **Actions** menu. The **Advanced** mode helps to limit and/or expand the scope of your search using boolean selections; adding selections can help locate better results. Additional information on the **Patron Selection** window's **Advanced** mode can be found in the *"Patron Selection Window"* section of Alexandria's **Online Help**.

Patron Selection Window: Simple

The **Sort By** drop-down menu allows you to select *what* data is searched for (e.g. **Last Name**, **First & Middle Name**, **Barcode**, **Student #**, **Site**, etc.) and how it is displayed in the **Patrons** management window once a match (or several matches) are found. Change the selection in the **Sort By** drop-down menu to search other fields.



The **Search Result Limit** drop-down menu allows you to limit the number of results returned for your **Find**; you can choose between **50**, **200** (default), **500**, **1000**, **2000**, or choose *not* to limit your results and have **All Records** returned.

Click the **Search** button to locate records or click the **Cancel** button to close the **Patron Selection** window and return to the most recent patron record. When a **Search** is successful, the **Patron Records List** in the **Patrons** management window is populated with results and automatically set to the same **Sort By** filter as the **Patron Selection** window.

Step by Step: Display Only Operators in the Patron Records List

There are times you may need to only display operators in your **Patron Records List** pane:

Step 1. Choose **Patrons** (Cmnd/Ctrl+L) from the **Show** drop-down menu.

Step 2. This opens the **Patrons** management window.

Step 3. From the main **Edit** drop-down menu choose **Find** (Cmnd/Ctrl+F).
- or -
Click the **Find** button located near the bottom of the **Patron Records List** pane.
- or -
Choose **Find** (Cmnd/Ctrl+F) from the primary **Actions** menu.
Any of these will open the **Patron Selection** window.

Step 4. Select **Advanced** from the **Actions** menu in the bottom-left corner of the **Patron Selection** window; the window will switch to **Advanced** mode.

Step 5. Using the **Select By** drop-down menu, choose **Last Name**.

Step 6. In the associated **Starting With** field, type "A".

Step 7. In the associated **Ending With** field, type "Z".

Step 8. Next, click the **Add Selection** button located near the bottom of the boolean list.

Step 9. Change the boolean operator drop-down menu from **And** to **And Not**; this drop-down menu appears to the left of the **Select By** drop-down menu.

Step 10. Using the **Select By** drop-down menu, choose **Security Group**.

Step 11. From the related selection drop-down menu that appears below, choose **Patron**.

Step 12. Finally, press <enter> or click **Search**.

Step 13. Results for your search will appear in the **Patron Records List** pane of the **Patrons** management window, containing all the operator records (i.e. non-patrons) that exist in your database.

Shortcut Keys

Accelerator and Hotkey Commands

Hotkeys—Hotkeys are the underlined characters in a menu item or dialogue box that allow users to access the item or control by pressing that character's key on the keyboard. In the case of dialogue controls, the user may have to hold down the <alt> key before pressing the hotkey. Hotkeys are sometimes referred to as *shortcut* keys, *access* keys, or *mnemonic* keys.

Windows Shortcut Keys

Ctrl+Shift+N	New Document
Ctrl+O	Open
Ctrl+W	Close Window
Ctrl+Alt+W	Close All
Ctrl+S	Save
Ctrl+Shift+S	Save As Text
Ctrl+P	Print
Ctrl+Shift+E	Restart
Ctrl+Shift+E	Log Out
Ctrl+Q	Exit Alexandria
Ctrl+Z	Undo
Ctrl+Shift+Z	Redo
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+V	Paste
Ctrl+A	Select All
Ctrl+F	Find
Ctrl+G	Find Again
Ctrl+;	Preferences
Ctrl+T	Circulation
Ctrl+I	Items
Ctrl+L	Patrons
Ctrl+K	Researcher
Ctrl+C	Search

Windows Circulation Shortcut Commands

These shortcut commands allow you to quickly perform Circulation actions.

Ctrl+1	Start Bookdrop
Ctrl+2	Make Charges/Payments
Ctrl+3	Show Current Patron Details
Ctrl+4	Remove Current Patron Holds
Ctrl+5	Remove Current Patron Reservations
Ctrl+6	Show Current Item Details
Ctrl+7	Adjust Current Item Holds
Ctrl+8	Remove Copy Reservations
Ctrl+R	Renew Current Patron Items

Accelerator keys—An accelerator key is a keyboard shortcut that is accessed by holding down modifier keys (<shift>, <ctrl>, <alt>, or combinations of these) and pressing another key on the keyboard. Accelerator shortcuts appear to the right of a menu item text.

Macintosh Shortcut Keys

⌘ + H	Hide Alexandria (Carbon)
⌥ + ⌘ +H	Hide Others (Carbon)
⇧ + ⌘ +N	New Document
⌘+O	Open
⌘+W	Close Window
⌥ + ⌘ +W	Close All
⌘+S	Save
⌥ + ⌘ +S	Save As Text
⌘+P	Print
⌥ + ⌘ +P	Print to PDF
⇧ + ⌘ +E	Restart
⌘+Q	Log Out/Quit Alexandria
⌘+Z	Undo
⇧ + ⌘ +Z	Redo
⌘+X	Cut
⌘+C	Copy
⌘+V	Paste
⌘+A	Select All
⌘+F	Find
⌘+G	Find Again
⌘+;	Preferences
⌘+T	Circulation
⌘+I	Items
⌘+L	Patrons
⌘+K	Researcher

Macintosh Circulation Shortcut Commands

These shortcut commands allow you to quickly perform Circulation actions.

⌘+1	Start Bookdrop
⌘+2	Make Charges/Payments
⌘+3	Show Current Patron Details
⌘+4	Remove Current Patron Holds
⌘+5	Remove Current Patron Reservations
⌘+6	Show Current Item Details
⌘+7	Adjust Current Item Holds
⌘+8	Remove Copy Reservations
⌘+R	Renew Current Patron Items

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